Virtual Innovation Awards

VIRTUAL SUPPORT SERVICES PLANNING GUIDE

Taking a Holistic Approach to Virtual Support Services

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Student Affairs Administrators in Higher Education

ACKNOWLEDGMENTS

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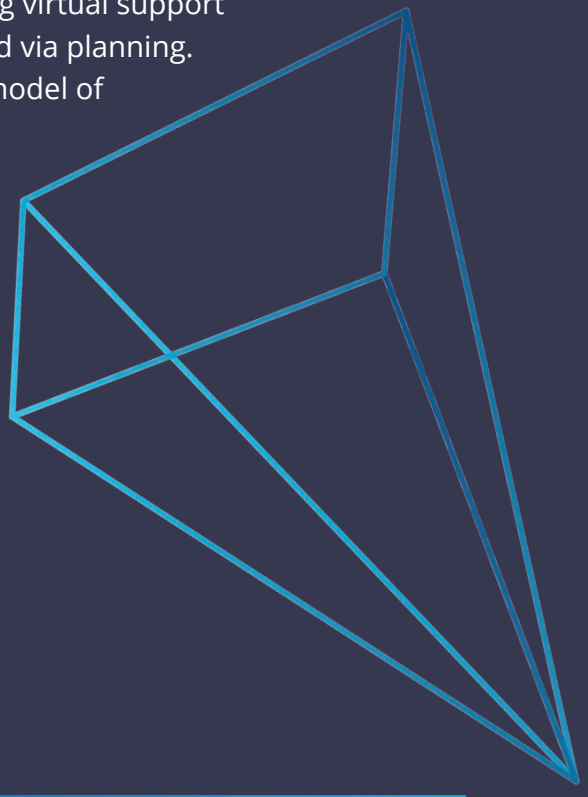
Introduction

Knowledge about digital learning, diverse student engagement preferences, and multimodal delivery of support services has steadily grown over time. As institutions continue to build on these insights and consider lessons learned from those operations that shifted during the pandemic, they must consider ways to effectively integrate virtual support services into long-term student success strategies. To ensure that students have flexible learning and engagement options, campus offices will have to take a collaborative, hybrid approach to their support services. Rather than delivering siloed virtual supports—in isolation from each other and from in-person supports—institutions must coordinate their network of virtual and in-person supports to create seamless student experiences.

To produce this seamless experience and to better address the increasing demand for virtual support programs and services, institutions should take a comprehensive approach to virtual support that responds to students' financial, academic, social, and mental well-being as well as career needs and goals. This holistic tactic enables campuses to offer a more personalized virtual experience for students; it also presents opportunities for institutions to design a well-coordinated suite of virtual supports with which students can engage based on their unique needs and interests.

The guide is designed to help primarily in-person colleges and universities examine key aspects of their current institutionwide approach to delivering virtual support services and identify opportunity areas that can be addressed via planning. Although the guide was written and reviewed with a hybrid model of support services in mind, completely online institutions and other audiences can also glean insights from it. This guide is informed by and builds upon NASPA's case study findings in *Spotlighting Virtual Innovation: Award-Winning Strategies for Leveraging Technology to Support Students During the COVID-19 Pandemic and Beyond*, which describes how 10 institutions delivered—at scale—virtual supports to address multiple areas of student need. The planning guide is a synthesis of insights from the research and incorporates direct feedback from six experts in the field.



HOW TO USE THE GUIDE

The guide is intended to help institutions that are ready to adopt, or are in process of adopting, an integrated and coordinated approach for delivering virtual support services to students who are attending college online and/or in person. Institutions are encouraged to use the guide as part of planning discussions, as it can facilitate collaborative decision making across 10 essential areas: (1) Vision and Goal Setting, (2) Data Collection and Utilization, (3) Equity and Accessibility, (4) Internal Collaboration and Coordination, (5) Community Building, (6) Experimentation and Ingenuity, (7) Scalability and Sustainability, (8) Student Readiness, (9) Training and Professional Development, and (10) Risk and Compliance. The holistic nature of the guide means that certain insights, such as those related to professional development and data assessment, appear in more than one essential area; other insights are more clearly connected and applicable to specific contexts. Each of the guide's 10 essential areas includes a description of ideal conditions, indicators of progress, and discussion questions:

IDEAL CONDITIONS

Ideal Conditions describe what an optimal environment for delivering virtual support services in coordination with in-person operations may include as this environment relates to each of the 10 essential areas.

KEY INDICATORS OF PROGRESS

Indicators of Progress can serve as a checklist of tangible actions, markers, or deliverables that evidence movement toward creating aforementioned Ideal Conditions. Note that indicators with an *asterisk** are distinguished by level of resource intensity or progress, and the list is not exhaustive. As with all aspects of this guide, indicators should be selected and adapted based on specific institutional needs and contexts.

DISCUSSION QUESTIONS

Discussion Questions offer considerations related to each essential area; they are meant to be included as part of collaborative planning efforts.

NOTE:

- For many institutions, virtual support services will involve multiple audiences and partners, including students, student affairs, academic affairs, information technology, institutional research, central communications offices, multicampus organizations, and more. Recognizing the cross-functional nature of the work within a larger system, the authors encourage using this guide as part of a team effort.
- This guide is not meant to be prescriptive, in replacement of necessary standards, or used without consideration of contextual differences. The authors encourage institutions at varying stages of readiness for adoption to use the guide to establish a tailored and phased set of action steps most relevant to individual priorities.
- Incorporating scenarios and examples specific to your institution as your team reviews the guide will strengthen the usefulness of insights.

Getting Started

The authors recommend that institutions consider taking the following steps when using the guide to inform planning efforts:

STEP 1 Convene a group of stakeholders and a mix of individuals with different content knowledge and technical expertise across multiple departments and divisions. To ensure sustainability and continuity of efforts, formally establish systems that support cross-institutional collaboration. Also, campus teams should choose an appropriate pace for discussions, as the guide covers many topics for which professionals may need to have multiple planning sessions.

STEP 2 Gather and review relevant data to audit current systems, policies, and practices. Self-assessment can give a snapshot of existing resources that can be maximized, scaled, or phased out; urgent and more emerging needs; opportunities for innovation; and areas for developmental and awareness-building efforts.

STEP 3 Develop a comprehensive and sequenced plan aligned with the institution's goals and needs of its unique student populations. The plan should be centered on equity and include priority actions for immediately addressing the most critical needs. Insights across the guide's 10 essential areas can inform benchmarking and scoping discussions.

STEP 4 Document and continuously evaluate progress, successes, and lessons learned related to adoption efforts. Establishing a feedback loop that is responsive to students, staff, and faculty is a critical piece of this step.

STEP 5 Iterate plans and approaches as knowledge evolves about impact and needs. Share widely any new iterations of a plan and reasons for changes.

Cross-institutional teams and collaboration systems will vary across institutions, but some perspectives to consider as part of a team reviewing this guide might include the following:

Information Technology (IT) Professional(s) can effectively determine technology needs, identify best technology options to support the work, coordinate the use of other available platforms when relevant, and serve as a project manager to ensure successful implementation and operation of the technology.

Subject Matter Expert(s) with relevant content knowledge can ensure that a virtual support service is leveraging effective practices and follows any relevant regulations and policies. For example, a virtual mental health mobile app should have design input from a certified health professional who can guarantee that policies are following the Health Insurance Portability and Accountability Act's regulations.

Student Support Professional(s) in a predominantly student-facing role can provide useful insights on student and staff experiences with technology systems at the institution, ensure seamless transitions from in-person to virtual spaces, and liaise with students. Such a professional should have a deep understanding of the variety of student experiences at the institution and can play a vital role in supporting feedback loops to regularly hear students' needs and preferences.

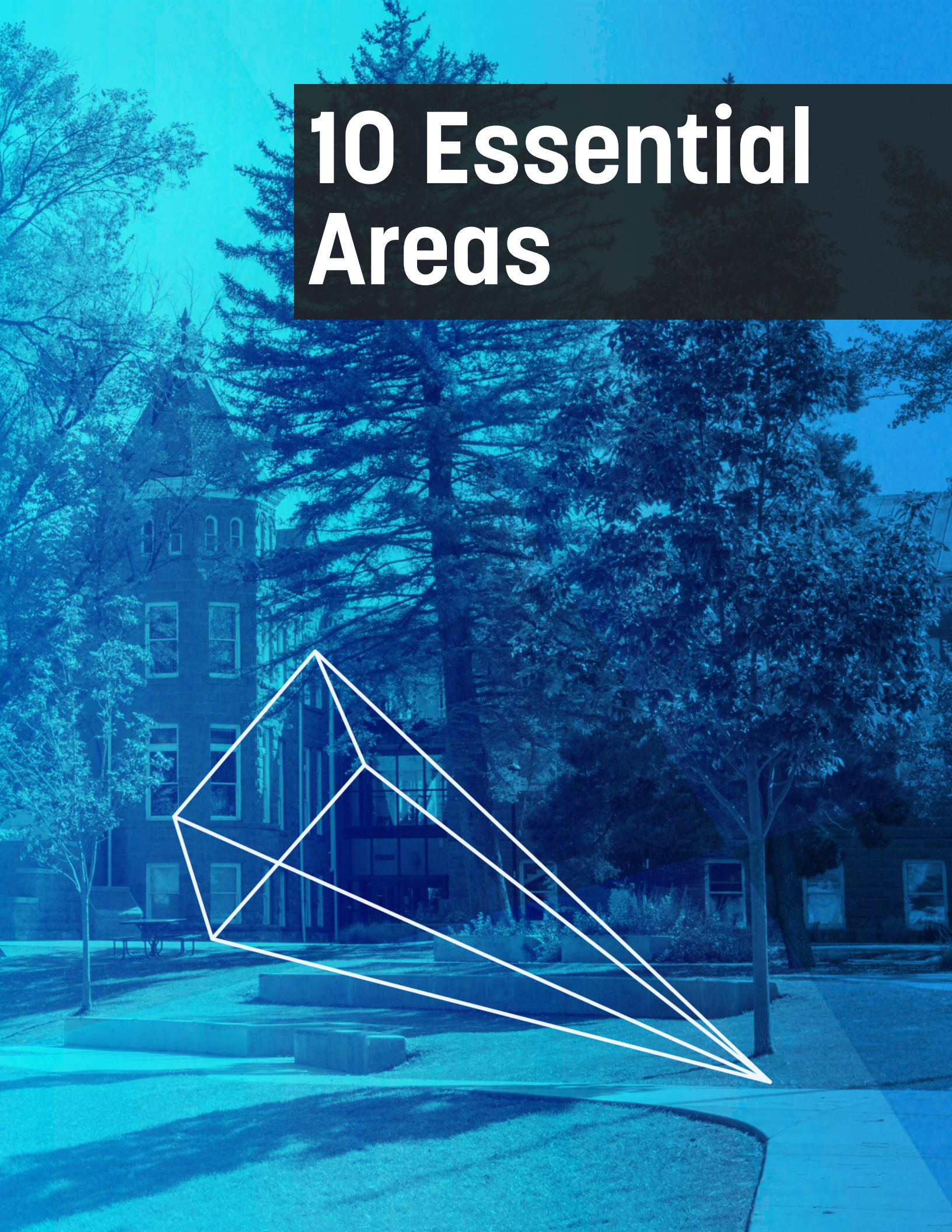
Institutional Research Professional(s) can quickly gather and present data insights about the impact of a virtual support—including a specific focus on disaggregating student data across demographic characteristics—and guide the team through the limitations and caveats of findings during action-oriented discussions.

Business Analyst(s) with an understanding of relevant processes and requirements and a level of tech-savviness can help to translate technology jargon to non-IT stakeholders when discussing requirements and technology capacities; review assessment metrics and identify opportunities for improved efficiencies; communicate programmatic needs and goals to IT specialists; and examine assessment metrics to improve efficiencies and sometimes offer recommendations to leadership.

A Team Lead, if empowered to make final determinations when necessary, can ensure uninterrupted workflow, has the authority to allocate resources to virtual support services or programs, and leads and promotes buy-in about the strategic direction for the approach.

Modified excerpt from: *Chamberlain, A. W., Burnside, O., Wesaw, A., & Parnell, A. (2021, October 13).* Spotlighting virtual innovation: Award-winning strategies for leveraging technology to support students during the COVID-19 pandemic and beyond*. NASPA–Student Affairs Administrators in Higher Education. https://www.naspa.org/report/spotlighting-virtual-innovation-award-winning-strategies-for-leveraging-technology-to-support-students-during-the-covid-19-pandemic-and-beyond*

10 Essential Areas



I. Vision and Goal Setting

The success of any implementation and change effort depends on having a clear and agreed-upon vision. This first requires senior leaders to articulate their expectations and allocate appropriate resources. From there, staff, in collaboration with relevant stakeholders, should draft a comprehensive plan on how they will achieve the vision; that plan should include target goals and performance metrics, key actions, and resources needed (e.g., staff required, technology needs, efficient processes).

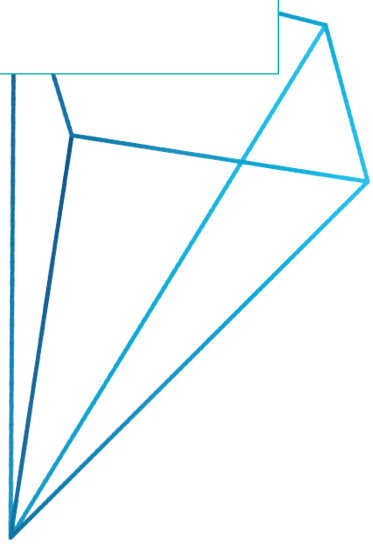
IDEAL CONDITIONS	SCALE OF ADOPTION
▷ Leadership prioritizes strengthening virtual support services as a student success priority through communications, resource allocations, and/or alignment of it with other strategic priorities.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Leadership has a clear institutionwide vision for virtual support services that addresses students' academic, career, financial, social, and personal needs.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Key stakeholders (e.g., leadership, faculty, staff, students) codevelop and widely share a comprehensive plan that has goals and intended outcomes for actualizing the intended vision for virtual support services, including technology selection.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Leadership regularly reviews the strategic plan with key stakeholders and responds to recommendations for improvement.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Division/department/office-level goals and intended outcomes for virtual support services align with the institutionwide vision set by leadership.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

- The vision, strategic plan, and intended outcomes for virtual support services are publicly available online and detail the institution's approach for integration with in-person support services.
- Leadership has identified the primary goals to reach priority student populations with virtual support services.
- A clear leadership and accountability structure has been put in place to define where decision making will occur and who will be responsible for key outcomes associated with virtual support services.

DISCUSSION QUESTIONS

- To what extent do current virtual support services align with the institution's mission and vision for student success?
- Who are the institution's prioritized student populations for virtual support services (e.g., prospective, part-time, full-time, transfer, students with disabilities, international, on-campus, distance learners, commuters)? When are students using virtual services? When are students using in-person services? Which students are using which services?
- Which virtual support services should be centralized and scaled across the institution, and which are best managed at the division/department/office level?
- How is leadership discussing metrics and outcomes of virtual support services within institutionwide student success reports and as part of formal planning processes?
- When and where does leadership communicate the value of virtual support services as an institutional priority?



> "The more we asked why, the better we were able to get to a solution that worked for our students and make it better. I would tell other institutions, keep asking . . . why."
>
> —*Georgia State University Professional*

II. Data Collection and Utilization

Strategic uses of quantitative and qualitative data inform decisions about the delivery of virtual support services. Examples include leveraging existing data from the enterprise resource planning system; conducting periodic listening sessions; and surveying students, staff, and faculty. Professionals across the institution share data with a goal of telling a complete story about a student's journey, advancing successful efforts, and addressing areas for improvement collaboratively.

IDEAL CONDITIONS	SCALE OF ADOPTION
▷ Staff and faculty have the capacity to access, interpret, and utilize necessary data to inform their delivery of virtual and in-person student support services.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Race, ethnicity, gender identity, socioeconomic status, age group, location, disability status, and other student demographic characteristics are considered in all data-informed discussions of how to effectively deliver virtual support services.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ A representative and diverse sample of students, staff, and faculty provides a well-balanced mix of qualitative and quantitative data related to virtual support services and experiences with technology.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Professionals across the institution regularly share data on the quality, access, utilization, and outcomes of virtual support services, to determine impact and inform continuous improvement decisions.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Infrastructures are in place to collect information from multiple sources and quickly report student concerns, questions, requests, and feedback to appropriate entities so that they can be resolved with minimal delays.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

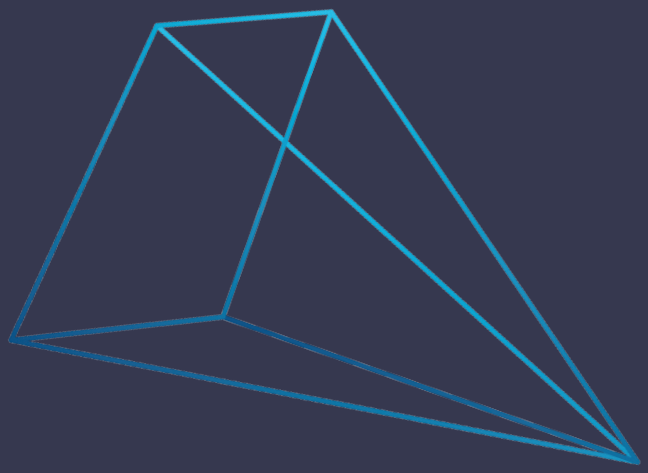
KEY INDICATORS OF PROGRESS

- Data on the frequency and utilization of different features within institutionwide technology systems (such as the learning management system [LMS]) are known.
- Campus work groups identify and align performance/impact across various student success initiatives.
- Performance/impact data are available to and understood by those responsible for virtual support services decisions and outcomes.
- Data can be disaggregated to a level necessary to make nuanced and clear comparisons on the outcomes of virtual and in-person support services.
- Institutional leaders or designated staff ensure that data collection efforts have been audited for duplication, and a streamlining plan is in place.
- Data systems are integrated enough to allow for staff and faculty to view a single student record (according to FERPA [Family Educational Rights and Privacy Act] requirements) of all interactions with virtual and in-person services.*

DISCUSSION QUESTIONS

- How is the institution tracking use of virtual support services so that there is one integrated record for each student?
- In what ways is the institution focusing on student data related to virtual support services in decision making?
- How are data used to show connections between effective delivery of virtual support services and the institution's strategic plan? How are the data able to identify areas in need of additional support?
- In what ways is the institution consistently incorporating multiple student perspectives into the assessment and improvement of virtual support services?
- Does the institution have ample opportunities for staff and faculty to retrieve without additional assistance real-time data from the student information system, learning management system, and other campuswide systems?
- For services managed at the division/department/office level, what metrics or oversight are placed on those units to assure quality virtual support services for their students?

DATA POINTS TO MONITOR



Throughout this guide, information is presented to help institutions think more critically as they design, strengthen, and build their capacity to implement a comprehensive network of virtual support services in a hybrid environment. Regardless of the phase of adoption an institution may be in along the 10 essential areas, data, when leveraged correctly, constitute the underlying current that allows institutions to accelerate toward creating a seamless, holistic virtual support experience for students. Like other campus-based initiatives, data enable an institution to (a) further understand the current state of services and programs, (b) establish realistic goals and performance targets, (c) monitor implementation and make necessary improvements, and (d) understand the overall impact of efforts.

The following are some examples of the data institutions should collect, track, and analyze as they undergo building or strengthening virtual services and programs.

UNDERSTANDING THE CURRENT STATE

Institutions should have a solid understanding of how virtual supports currently meet the vision and needs of their student population. Taking the time to adequately assess and evaluate virtual support programs is necessary to spot any gaps in services, enhance programs' effectiveness, and develop a realistic plan to scale and sustain support. Assessment also helps to establish a baseline for leaders and staff to track their progress over time.

- Number of virtual support services in operation
- Frequency and timing of virtual support service utilization, disaggregated by offering, functional area, and student demographics
- Faculty and staff's comfort level in providing effective support virtually
- Student satisfaction with virtual support services
- Number and types of requests/questions received from students
- Processing times of requests and follow-up with students

➢ Data Points to Monitor

ESTABLISHING GOALS AND PERFORMANCE TARGETS

In addition to establishing a baseline of virtual support efforts, all of the data and metrics mentioned above should help to identify realistic goals and performance targets. Institutions may also consider identifying targets that take into account the sequencing of new programs and services, as well as resource allocations.

- Number of new virtual support services piloted in an academic year
- Number of new virtual support services fully implemented in an academic year
- Cost per student over time of each service (measure of scalability)

MONITORING IMPLEMENTATION AND CONTINUOUS IMPROVEMENT

Once an institution has an agreed-upon vision and goals for virtual support, an important step is to identify data and metrics that can be leveraged to better understand and monitor progress toward these goals. These data and metrics are typically not traditional student success indicators, such as retention rates, graduation rates, and GPA, but more leading and process-based metrics, such as program attendance or number of students served through virtual support services.

- Number of training and professional development opportunities for staff and faculty
- Student usage patterns of virtual services delineated by dates and time
- Staff/student ratios for required support services
- Number of students serviced (dates, time)
- Student feedback on satisfaction of support received
- Staff feedback regarding pace of work, satisfaction with the service, and job demands

➢ Data Points to Monitor

IMPACT ON INSTITUTIONAL OUTCOMES

Virtual support services are designed to be an additional way for students to obtain the resources they need to meet their academic, professional, and personal goals. Therefore, as institutions continue to build and refine their virtual supports, they should also feel encouraged to understand how virtual support services impact priority institutional student success outcomes. Because many institutions have data-capacity constraints, some institutions may face more challenges in fully correlating virtual supports to student success outcomes; however, any insights will be beneficial in demonstrating how virtual supports contribute to the institution's success.

- Effects on persistence, retention, and completion
- Impact of virtual support services compared to in-person services
- Effects and progress on student learning outcomes

III. Equity and Accessibility

Guaranteeing that all students can access and fully engage with virtual support services should be a top priority for institutions. Critical steps in this process are taking the necessary time to ensure that virtual programs and services are designed to align with accessibility standards, leverage equity-minded best practices, and address the unique needs of priority student populations (e.g., Black, Latinx/a/o, Indigenous, low-income, first-generation).

IDEAL CONDITIONS	SCALE OF ADOPTION
▷ Leadership, staff, and faculty have a comprehensive understanding of the prioritized virtual support service needs of and effects on priority student populations.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Processes and technology network infrastructures (e.g., bandwidth, servers, software, hardware) attest that virtual support services meet accessibility requirements and are being administered in the most equitable way.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ When possible, and when most relevant, staff and faculty who directly interact with students are diverse and reflective of the student body.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Virtual support services recognize and are responsive to students with basic needs insecurities and who have resource and privacy constraints at home, and who are balancing work, family, and other personal demands.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Processes are in place to engage with priority student populations, allowing for a consistent inclusion of multiple student perspectives.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Staff and faculty receive ongoing and necessary professional development to better understand equitable practices for delivery of virtual support services.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

- A designated entity has conducted an audit of virtual support services to ensure alignment with institutional equity objectives and practices.
- Staff and faculty have identified and addressed the necessary actions to reduce, and ultimately eliminate, inequities across virtual support services.
- A designated entity has confirmed that all services, programs, and other resources have been reviewed for accessibility and updated as necessary.
- Data on the needs, preferences, and engagement behavior of priority student populations as it relates to virtual support services are clear and inform proactive outreach strategies.
- Th percentage of students within priority student populations who are receiving proactive outreach about services, accessing them, and having positive outcomes is increasing.

DISCUSSION QUESTIONS

- In what ways are virtual support services constructed to be culturally affirming and supportive of differences in students' learning styles, identities, and preferences?
- How can the institution learn, share, and audit existing virtual support services and technologies to ensure equity?
- What opportunities exist for embedding equity-mindedness and the importance of cultural competence in the virtual context into onboarding, professional development, and training?
- Does the campus have accessibility tools available to deliver services and materials fully online (e.g., transcription services)?

> "While we can ask, 'How are you doing?' it's not good enough if you do not have a systemic response to how to help [students] handle the bad or sad news that they're providing. It's not good enough to just say, 'I'm sorry to hear that.' You ask what you can do—and be prepared to respond to them."
>
> —*Borough of Manhattan Community College Professional*

IV. Internal Collaboration and Coordination

Support services and related technology systems are well integrated and coordinated across departments; they align with the institutionwide vision for student success. The institution leverages a network of supports and technologies to rapidly respond to real-time needs of students, staff, and faculty. Structures, policies, and processes—which may include an advisory board or team composed of stakeholders and individuals with different content knowledge and technical expertise—ensure institutionwide collaboration, rapid-response support, and consistent experiences for students.

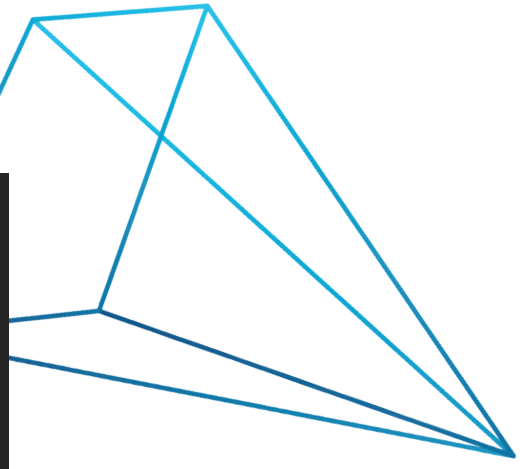
IDEAL CONDITIONS	SCALE OF ADOPTION
▷ A designated person or team is responsible for taking a systems-thinking approach to coordinating and advancing virtual support services and technologies at the institution.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Cross-functional communication structures are in place for monitoring the operationalization of institutionwide vision, improving efforts, and responding to student, staff, and faculty feedback.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Terminology, definitions, and standards of practice related to virtual support services are regularly updated, consistently used, transparent, and widely known by stakeholders.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Students, staff, and faculty have readily available ways (both online and in person) to request and receive technology-related support and resources, ask questions, report concerns, and give feedback.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Recommendations for improving delivery and/or integration of virtual support services are widely shared across the institution and address key student service areas.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

- A streamlined online point of entry for accessing virtual support services is in place.
- A designated person or team has conducted an inventory of technologies at the institution and identified opportunities for streamlining.
- A system for coordinating technology and policy updates is in place.
- A system for centralizing information about key insights—gained from individual areas across the institution—is in place.
- Complaints and pain points—that is, matters about which many students, staff, and faculty ask for technology or access support—are rarely repeated.*

DISCUSSION QUESTIONS

- How is the institution ensuring that various departments are sharing information with each other and communicating about virtual support services?
- What processes are in place to ensure that technologies and virtual support services are being selected/designed and implemented in consultation with key stakeholders and intended users?
- How is the institution minimizing the proliferation of technology platforms with similar functions?
- Who is best positioned to oversee, document, and report on outcomes from collaboration and information-sharing efforts?



"You have to intentionally let go and be willing to let others in and to work across divisions and silos. That, for me, would be my best advice to get the work and is in the best interest of the students."

—*Bay Path University Professional*

V. Community Building

Virtual support services and technologies can help students connect with peers and the institution to foster an authentic sense of community and belonging in online spaces. Students feel welcomed and are comfortable engaging in virtual community-building efforts.

IDEAL CONDITIONS	SCALE OF ADOPTION
▷ Leadership recognizes the importance of virtual communities and understands how these communities integrate with student life.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Virtual and in-person community-building services are interactive and allow students who are online to engage with each other, synchronously and asynchronously, and with those on campus (via technology, self-guided resources, person-to-person, etc.).	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Virtual community standards are student-led and fold into existing community standards for engagement.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Students have a central role in codeveloping the institutional structures, policies, and practices that shape the virtual communities they want.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Students are prepared and empowered to safely and respectfully demonstrate digital leadership, foster a digital identity, and participate in multiple virtual socialization opportunities.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

- An institutionwide plan for virtual community building across student stages (from prospective students to alumni) is in place.
- Virtual student interactions are logged, and data provide evidence of the quality of students' engagements.
- Participants in hybrid virtual and in-person community-building services report a similar level of engagement.
- Technology has functionalities needed for desired community-building activities.*
- Senior leaders invest in training and resources related to digital community management, student leadership/self-advocacy, technology use, and digital presence.*

DISCUSSION QUESTIONS

- What systems are in place for assessing how students are experiencing virtual community and the responsiveness of support services?
- Who is responsible for monitoring adherence to community standards? What policies are in place for when those standards are not met?
- How are students included in the process of creating, managing, and evaluating digital communities?
- What are known principles and effective practices for optimizing virtual student community-building efforts? How is the institution translating and adapting them?
- What opportunities are there to coordinate institution-sponsored virtual communities with spaces that already exist?

> "How can we be a little bit more innovative? How are we really pulling on the rest of the campus community to support some of our initiatives, especially with a lot of campus partners making bold statements that these are the populations of students that we should be putting a lot of energy toward? How do we leverage that?"
>
> —*University of Florida Professional*

VI Experimentation and Ingenuity

Creatively designed, effective virtual support services help maximize the capabilities and opportunities of being in a virtual environment on a hybrid campus. This perspective enables institutions to identify original or inventive approaches, pilot ideas and potential programs, and find ways to involve a beneficial mix of students, faculty, and staff in the design process.

IDEAL CONDITIONS	SCALE OF ADOPTION
▷ A combination of research, higher education best practices, and institutional culture is used to inform improvements to the institutionwide strategic plan for virtual student support services.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Staff and faculty are empowered and have ample time and resources needed to identify, pilot, and assess promising virtual support services.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ A diverse sample of intended users tests the virtual support services for usability and system glitches before such services are made available to all users. Beta testers receive compensation for this effort.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Systems are flexible enough to honor differences in needs across divisions/departments/offices.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ All members of the campus community regularly share insights about emerging virtual support service technologies and practices.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

- Plans for identifying and launching emerging services and technologies are in place and informed by a landscape scan of trends.
- Process metrics related to virtual support services, such as the number of students served and wait/response times, are integrated into the institution's assessment efforts.
- A process for monitoring support services' capacity and continuous improvement is in place.

DISCUSSION QUESTIONS

- How is the institution providing resources needed (e.g., innovation center) to test and validate support services that try to maximize the capabilities and opportunities of technologies and virtual engagement spaces?
- How does the institution encourage and, in some instances, incentivize efforts to try new approaches for delivering virtual support services?
- How has the institution benchmarked its virtual support services with those of peer institutions? In what ways is the institution similar, behind, or more advanced than its peers?
- In what ways can the institution bring students into the design process for virtual support services?

"You have to be willing to go through some trial and error. Something that works for somebody else may not work for you. I know we've definitely tried things and learned from them, and we're doing things to improve upon that. I don't think there's really an out-of-the-box [vendor] solution for every institution."

—*Montgomery County Community College Professional*

VII Scalability and Sustainability

The institution effectively leverages resources to deliver virtual support services in a hybrid campus environment. Leadership is committed to safeguarding resources and strategically planning to ensure the continuity and expansion of high-impact virtual support services to all students.

IDEAL CONDITIONS	SCALE OF ADOPTION
▷ Sustainable funding sources for the development, delivery, and advancement of effective virtual support services have been identified and secured.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Funding allocation for virtual support services is aligned with data about areas of highest student need and levels of utilization.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Workload and time required for staff carrying out virtual support services is evaluated by a designated entity on a yearly basis. Proper compensation and flexibility for staff is established to carry out duties.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Staffing structures, workflow, and scheduled work hours for hybrid support services align with student needs professionals' capacity.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Economies of scale, created through coordination with multi-institution systems or consortia, enable the expansion of service opportunities available to students.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Periodic stress tests inform capacity planning and indicate where resources should be adjusted across support services.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Scheduled scenario planning discussions help the institution identify options for adjusting operations and preparing for unforeseen outcomes.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

- Key metrics monitor the price of scaling various services as well as the impact of funds invested (return on investment).
- Data from an annual staff survey and other feedback inform pace of work and job demands.
- Assessment tools, such as workflow and support utilization mapping, determine necessary personnel and work hours to sustain delivery of virtual support services.
- The institution has conducted stress tests to determine the amount of stress in usage that each system can maintain without failure or shutdown.
- Staff/student ratios for required virtual support services are adequate for the number of students served.*

DISCUSSION QUESTIONS

- If the institution has mostly in-person operations, how are staff hours, ways of working, and other factors being modified accordingly to scale the delivery of virtual support services?
- In the next three years, what institutional investments in technology, personnel, or other areas are needed to enhance the delivery of virtual support services? What technologies should be phased out?
- What recurring sources of funding can be dedicated to improving virtual support services? What can these recurring funds cover (e.g., training, external systems)?
- Which functionalities related to virtual support services are most effectively handled in house? Which are best relegated to a vendor (e.g., outsourcing help desk compared with having staggered shifts of in-house staff 24/7)?

> "We leveraged what we were already doing well, and that helped us scale more broadly. Use resources that already exist on your campus instead of trying to implement new platforms."
>
> —*Northern Arizona University Professional*

VIII Student Readiness

All students are onboarded and prepared to use the institution's virtual support services, can navigate relevant systems, and receive intentionally tiered digital competency development opportunities. Students get timely, consistent, clear, and reliable information and training on how to access and use all required technology platforms and virtual support service systems. Areas for digital competency building may include establishing a common understanding about system terminology; expectations related to virtual supports and online courses; online communication skills; technology fluency; awareness about the benefits and negative side effects of technology; data privacy; and time management.

IDEAL CONDITIONS	SCALE OF ADOPTION
▷ A designated person or team is responsible for overseeing and updating student onboarding, training, and competency development opportunities related to the optimization of virtual support services.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Training and competency development strategies align with known effective pedagogical practices, student development in a digital context, and institutionwide priorities for student success.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Multiple sources of assessment data about level of student readiness to learn and engage virtually (including access to required technologies) inform the delivery of relevant supports and tools; priority student populations who most benefit from virtual supports receive advanced levels of developmental support.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ An easily navigable and dedicated space on the institution's main website includes information about the suite of virtual support services available to students; clear instructions about how students can access virtual support services; when and where to find live help and expected response time; and where to direct questions.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Students have a clear understanding about how to navigate the multiple ways to have real-time needs met and questions answered, including artificial intelligence, self-service, person-to-person, and virtual help desks.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

- Senior leaders have identified the professionals/entities responsible for onboarding, training, and competency development of students.
- A training and competency development plan that includes timeframes, performance metrics, and topic areas has been developed.
- Senior leaders have invested in the development and piloting of assessment tools to gauge student readiness for virtual learning and virtual support services.
- Student communications have been audited for streamlining and improvement opportunities.
- Professionals/entities responsible for onboarding, training, and competency development of students have created an online repository/hub of segmented resources, webinars, and learning opportunities.*
- All students are assessed for their readiness to learn and engage virtually.*
- Pre- and post- assessment data attest that onboarding, training, and competency development opportunities have improved students' ability to optimally use virtual systems and technologies.*

DISCUSSION QUESTIONS

- Who is responsible for coordinating communications to students at the institution/division/department/office level(s)? How is the effectiveness of outreach messages and methods evaluated?
- What technologies or resources do students need to access and optimally engage with virtual support services?
- What feedback loops are in place for centering students' perspectives in the development of readiness improvement plans?
- How easily can users navigate websites and other online platforms? How many clicks does it take to find information about virtual supports on the institution's website?
- What should be included in orientation and onboarding for students who are returning to in-person campus operations after being completely remote?

"We've thought very intentionally about the virtual supports and services to provide, but also about the mindsets, perspectives, attitudes, and beliefs that are critical to creating a community with a strong sense of belonging."

—*University of Arizona Professional*

IX. Training and Professional Development

All staff and faculty are onboarded and prepared to use the institution's virtual support services, can navigate relevant systems, and have a baseline knowledge about the availability, purpose, and limitations of technologies. Staff and faculty receive timely, consistent, clear, and reliable information and training on how to access and use all required technology platforms and virtual support service systems.

IDEAL CONDITIONS	SCALE OF ADOPTION
▷ A designated person or team is responsible for overseeing and updating institutionwide training and professional development opportunities related to the optimization of virtual support services.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Training and professional development strategies related to virtual support services are integrated into existing opportunities and aligned with institutionwide priorities for student success.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Multiple sources of assessment data inform the delivery of differentiated professional development supports and tools, which includes recognition of when specialized roles require advanced training.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ An easily navigable and dedicated online space provides staff and faculty with information about the suite of virtual support services available; clear guidance about when and how to refer students to online resources and virtual support services; and whom to contact with questions.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

- Senior leaders have identified the professionals/entities responsible for onboarding, training, and professional development of staff and faculty.
- A training and professional development plan that includes timeframes, performance metrics, and topic areas has been developed.
- Senior leaders have invested in the development and piloting of assessment tools to gauge staff and faculty readiness to optimally deliver virtual support services.
- Professionals/entities responsible for onboarding, training, and professional development of staff and faculty have created an online repository of segmented resources, webinars, and other professional development opportunities.
- All staff and faculty assess their readiness to optimally deliver virtual support services and/or understanding of when and how to refer students to online resources and virtual support services.*
- Pre- and post-assessment data attest that training materials have improved the ability of staff and faculty to optimally deliver virtual support services and clearly communicate to students how to use virtual systems and technologies.*

DISCUSSION QUESTIONS

- Who is responsible for monitoring and updating information and communications about the institution's suite of virtual supports to ensure it is accessible and accurate across all learning materials?
- What is needed to build out a continuous learning infrastructure for proactively identifying areas for professional development?
- How is the institution maximizing diverse areas of expertise held by key stakeholders or leveraging existing internal and external resources?
- How are organizational structures and resources set up to ensure that staff and faculty have the capacity to provide adequate attention to students seeking support both virtually and in person?

"It's the humans behind the technology that make the difference. You have technology, but it's the people that are the voice behind that [technology] who are so important."
—*California State University Channel Islands Professional*

X. Risk and Compliance

Virtual support services and technologies consistently adhere to institutional security policies and local, state, and federal laws and regulations, including but not limited to the Family Educational Rights and Privacy Act, the Americans with Disabilities Act, Protected Health Information, intellectual property, and privacy requirements. Related technologies and implementation of support services, especially those related to mental health, are designed to protect student confidentiality and recognize barriers to privacy in remote environments.

IDEAL CONDITIONS	SCALE OF ADOPTION
▷ The institution has a designated person or team responsible for overseeing, updating, and thinking holistically about risk, compliance, governance, and data privacy and adherence to regulations and policies.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Staff and faculty have a clear understanding of the relevant standards, laws, and regulations (at the local, state, and federal levels) and receive training with respect to data-privacy decision making.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Senior leaders plan for regular review and testing of virtual support service platforms, technologies, and vendor contracts to identify vulnerabilities and ensure compliance with regulations and protect student privacy.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary
▷ Staff and faculty follow safeguards that ensure all virtual interactions adhere to institutional policies and local, state, and federal laws and regulations.	☐ Not present ☐ Forming ☐ Emerging ☐ Functioning ☐ Exemplary

KEY INDICATORS OF PROGRESS

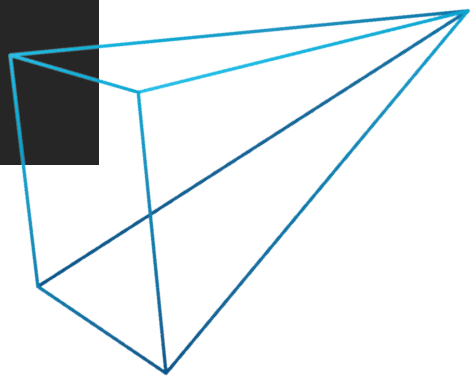
- Regulatory implications for virtual support services are clearly defined and well known.
- An individual or team responsible for risk, compliance, and data privacy is in place.
- Opportunities for the campus community to become aware of legal and regulatory requirements have been identified (e.g., websites, email communications, training sessions).

DISCUSSION QUESTIONS

- Who is responsible for monitoring the effectiveness of safeguards in place and revising them as needed?
- Who is responsible for the legal, risk, and compliance aspects of the virtual supports?
- Has the institution identified which standards of accreditation and policy should be considered when developing virtual support services?
- What safeguards and checks are in place for ensuring that the institution's suite of virtual support services are in compliance with local, state, and federal policies and regulations?

"There needs to be articulated accountability and responsibility, but you can still have that joined across different divisions. It doesn't have to have just one centralized person."

—*San Diego State University Professional*



Additional Considerations

The 10 focus areas of this guide are highly connected; as a result, successful efforts to address one area could likely lead to progress in other areas as well. Therefore, professionals should collaboratively pursue ideal conditions, as effective delivery of virtual support services relies on an institutionwide approach. Such collaboration can include both campus professionals and external partners as appropriate. Although this resource presents a robust approach for offering virtual support services, it does not fully account for differences in institutions' financial position, technology capabilities, and staff capacity. Therefore, it is reasonable for professionals to discuss which indicators of progress can be acted on immediately and which will require longer term implementation.

To learn more about NASPA's research on this topic and context for this guide, please visit https://www.virtualsuccess.naspa.org. Institutions should also engage with the wide range of existing resources on the topic to inform virtual support service planning efforts. The following list offers a small sample of resources to consider:

- Bates, C. (2017, December 13). *IT governance toolkit*. EDUCAUSE. https://library.educause.edu/resources/2017/12/it-governance-toolkit
- Budhai, S. S. (2020). *Online & engaged: Innovative student affairs practices for online learner success*. NASPA–Student Affairs Administrators in Higher Education. https://www.naspa.org/book/online-and-engaged-innovative-student-affairs-practices-for-online-learner-success
- Hanover Research. (2020). *Best practices: Virtual student engagement*. https://cdn2.hubspot.net/hubfs/3409306/Best-Practices-in-Virtual-Student-Engagement.pdf
- Hoffman, J., Eberhardt-Alstot, M., & Leafstedt, J. (2020, May 20). *Orienting students to online learning: A must for student success*. EDUCAUSE. https://er.educause.edu/articles/2020/5/orienting-students-to-online-learning-a-must-for-student-success

- New, J. (2020). *Future-proof: Reimagining student affairs for modern learners*. InsideTrack. https://www.insidetrack.org/wp-content/uploads/2020/03/WhitePaper_NASPA_2020_InsideTrack-3.pdf
- Online Learning Consortium. (n.d.). Retrieved April 25, 2022, from https://onlinelearningconsortium.org
- Waldner, L., McDaniel, D., & Esteves, T. (2019). eCelebrations: Virtual graduations to celebrate online students. *Online Journal of Distance Learning Administration, 22*(3). https://ojdla.com/archive/fall223/waldner_mcdaniel_esteves223.pdf
- Web Accessibility Initiative. (2022). *Web content accessibility guidelines.* https://www.w3.org/WAI/standards-guidelines/wcag
- Western Interstate Commission for Higher Education. (n.d.). *Guidelines for creating student services online*. https://wcet.wiche.edu/wp-content/uploads/sites/11/2021/08/Guidelines-for-Creating-Students-Services-Online-Lessons.pdf