How Best to Customize Blue Dashboard to Inform Your Decision-Making and Improvement Actions

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Agenda

- Dashboard Overview
- Configuration Best Practices/Tips
- Scenarios
- Bonus scenario: Other types of evaluations

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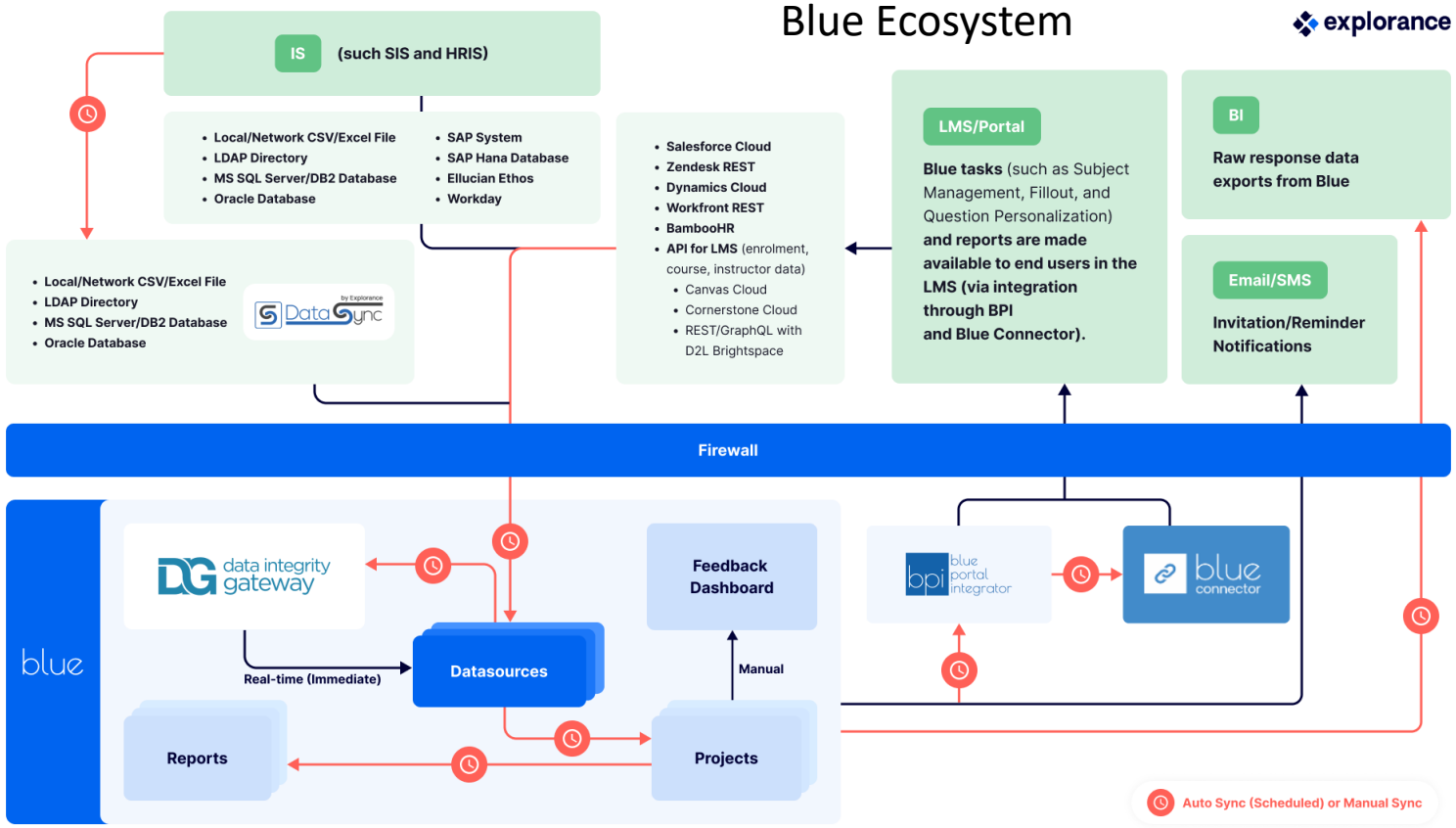
Blue Dashboard Overview

- Add-on analytics module within Blue platform
- Data comes from the projects (manual)
- Compliment to Blue Reports (static/official) - provides data in user's hands



Blue Dashboard Overview cont'd

- Each Dashboard has 2 submodules:
  - Individual Dashboard
  - Aggregate Dashboard

- Individual – users are assigned access when
  - They are the user defined as the secondary subject when using multiple secondary definition (including SS optional) or pairing definition
  - They are the user defined as the subject when using a subject definition
  - Upon entry, view is high-level with results for all subjects over time periods
  - Can drill down to the individual subject level

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Blue Dashboard Overview cont'd

- Aggregate – users are assigned access based on the hierarchy setup and views are according to user's level

Example: Chair of a Dept or HR Director for all employees

  - Could leverage the DRA set up for Reports, or create a different one depending on the need
  - Similar to Individual – viewing all data but can drill down to the individual subject level

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Best Practices

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Configuration Best Practices/Tips

- Upgrade to the latest version (4.2) to fully leverage new features

- Questions
  - Use identifiers for common questions across projects

- Question Groups: Opportunity to choose main themes to focus on
  - Remember it's the first thing your viewers see prior to drilling down

- Demographics:
  - enabling "pre-calculated normative comparison" option for selected demographics allows viewer to compare results against group norm i.e. Department
  - Display additional primary subject information to provide users more context

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Configuration Best Practices/Tips cont'd

- Summary view:
  - Tell senior leaders how things are going (score/score + trend widget)
  - What to focus on (ranking widget)
  - Customizable for each dynamic group i.e. Provost, Dean, Chair

- Time scales meaningful to your organization i.e. Terms, Quarters
  - Allocating responses to time periods
  - Adding additional time scales at higher unit allows for trend analysis over longer time period i.e. Year, Academic Year

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Configuration Best Practices/Tips cont'd

- Statistics (under Options):
  - Choosing a default but including other statistics to allow viewers options for multiple analysis

  i.e. Response Rate, NPS

- Customize
  - Labels for primary and secondary subjects
  - Dashboard views - provide descriptions and link to resources for additional guidance

- Create global presets for standardized comparisons for individual viewers

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Configuration Best Practices/Tips cont'd

- Remember!
  - Configuration setup is same for Individual & Aggregate (except for Summary)
  - Leverage Data Selection (under Preview) to refine dataset available as necessary

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Polling Question

From the best practices we just reviewed, which settings are you planning to revisit?

(select all that apply)

- Question / Question Groups
- Demographics
- Summary view
- Time Scales
- Statistics
- Customizations
- None, I'm already using the best practices!

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Scenarios

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By User: Instructors/Module leaders

Similar to the report received, the Dashboard has

- Thresholds applied to protect anonymity
- Saved responses are included
- Using Global preset, quickly compare results with group norms i.e. Dept avg
- Under Data Analysis – more contextual information for each subject
- Can drill down to the subject level to view individual results

The added advantage: Trend Analysis

  - View all courses/modules over the different time periods
  - Can compare and filter while analyzing

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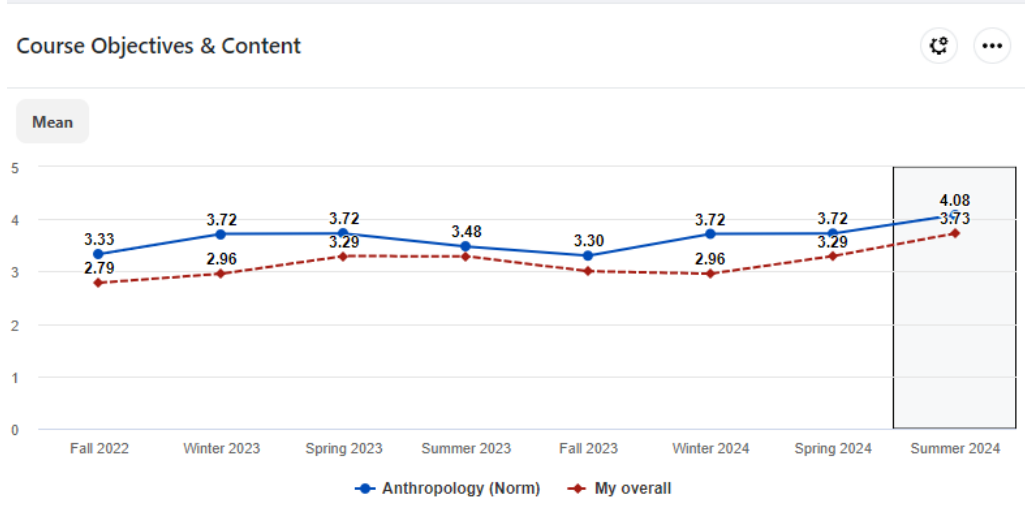
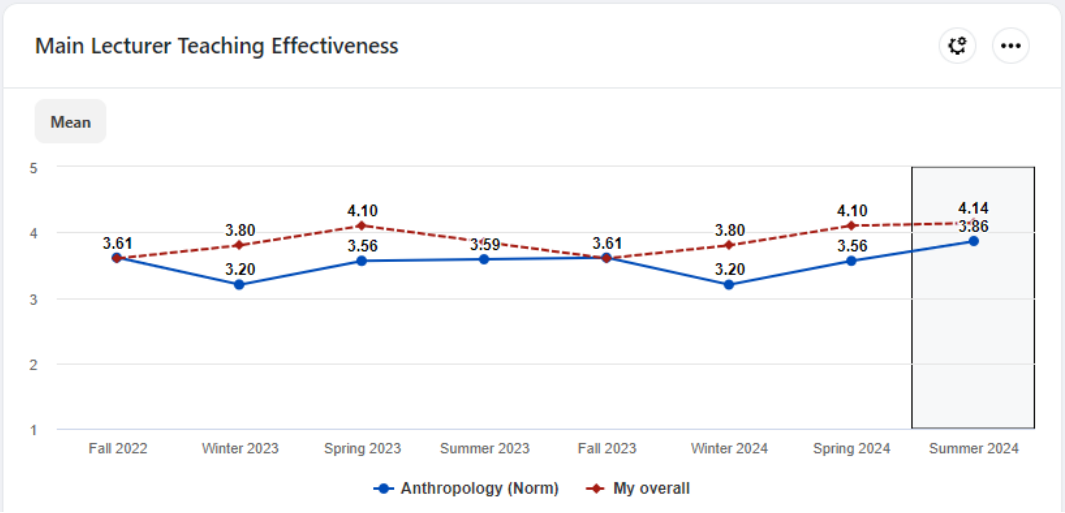
Instructors/Module leaders cont'd

Trend analysis

On the trend analysis page, users are able to view a trend for all of the available question groups. The score for each time period is plotted on a graph. Users can filter, compare, and drill deeper into a data point for further analysis. Access the Dashboard Guide





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Instructors/Module leaders cont'd

- Prepare a portfolio and create print previews :
  - High-level trend view for all Question Groups over semester and/or year with standard comparison added (using global preset)
  - High-level trend view comparing all courses (tip: switch to bar chart)
  - Detailed trend view comparing all courses
  - Table view with for a particular time period

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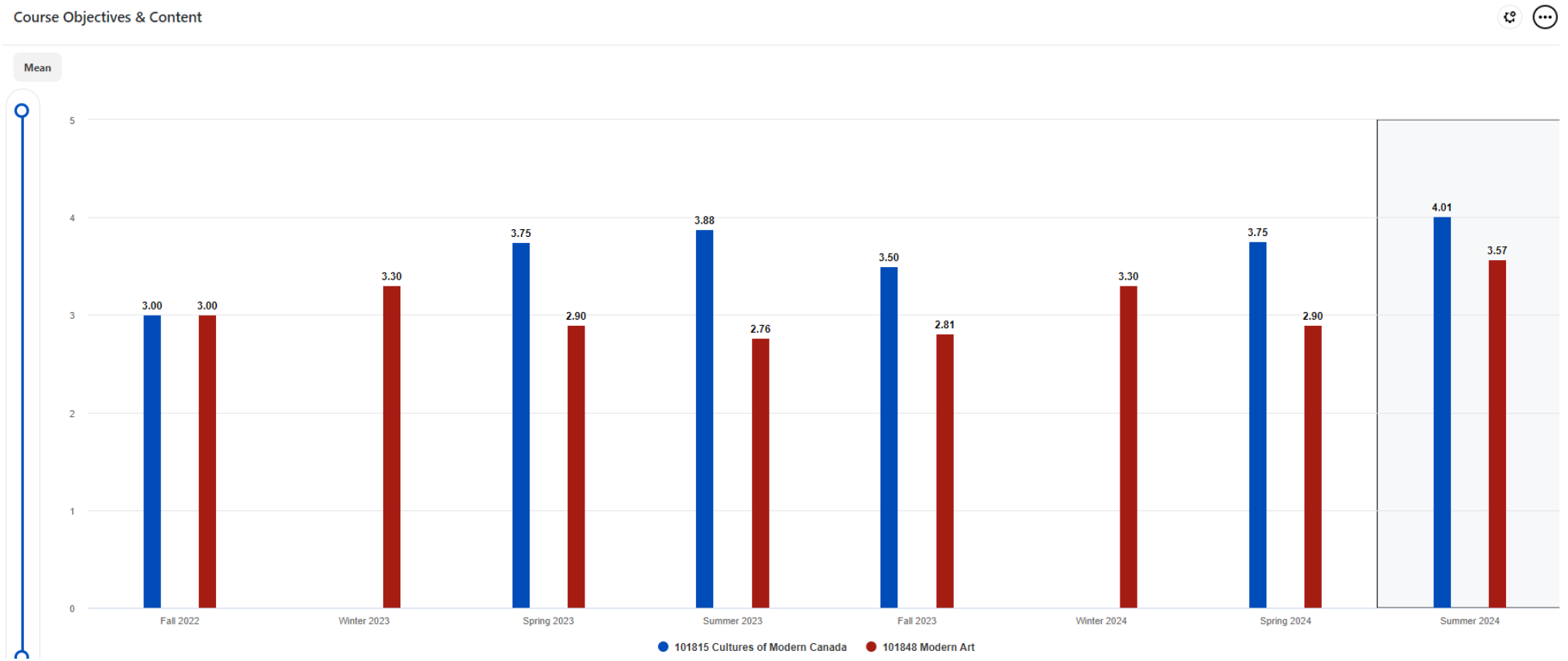
Instructors/Module leaders cont'd



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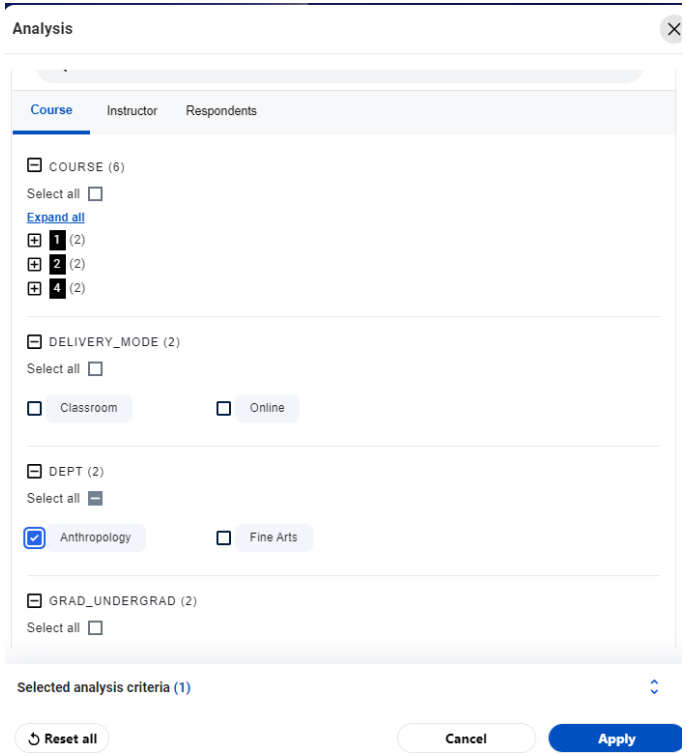
By user: Academic leader

- Summary view tells me who/what to focus on:

Example, need to dig deeper into Dept X

- Click on Filter and choose the Dept. All sections of the Dashboard will now show response data from that dept only

- Why filter? They allow you to :
  - Filter by any subject, secondary subject or respondent demographic data to present a subset of data
  - Can save as a preset
  - To clear, click “reset” or the “x”



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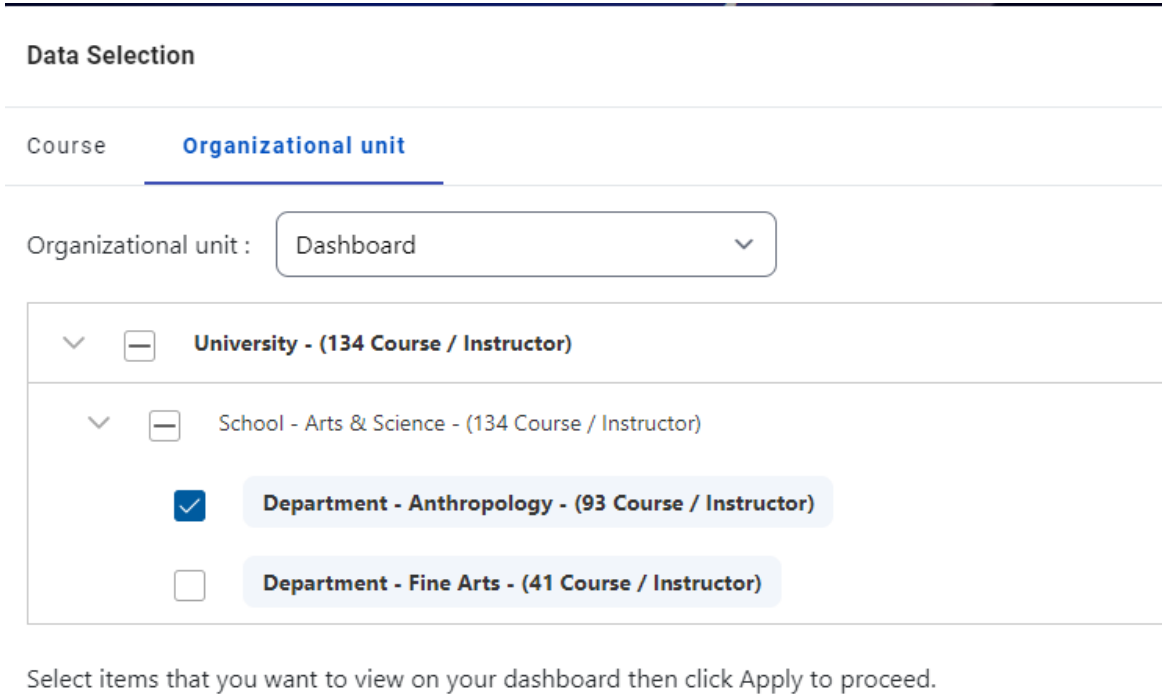
Academic leader cont'd

- Use Data Selection when :
  - Need to go into more complex or very specific filtering - use of **and/or** when determining selection criteria
  - Can exclude data based on subject or secondary subject demographics or by organizational level
  - To Reset – re-select everything and apply



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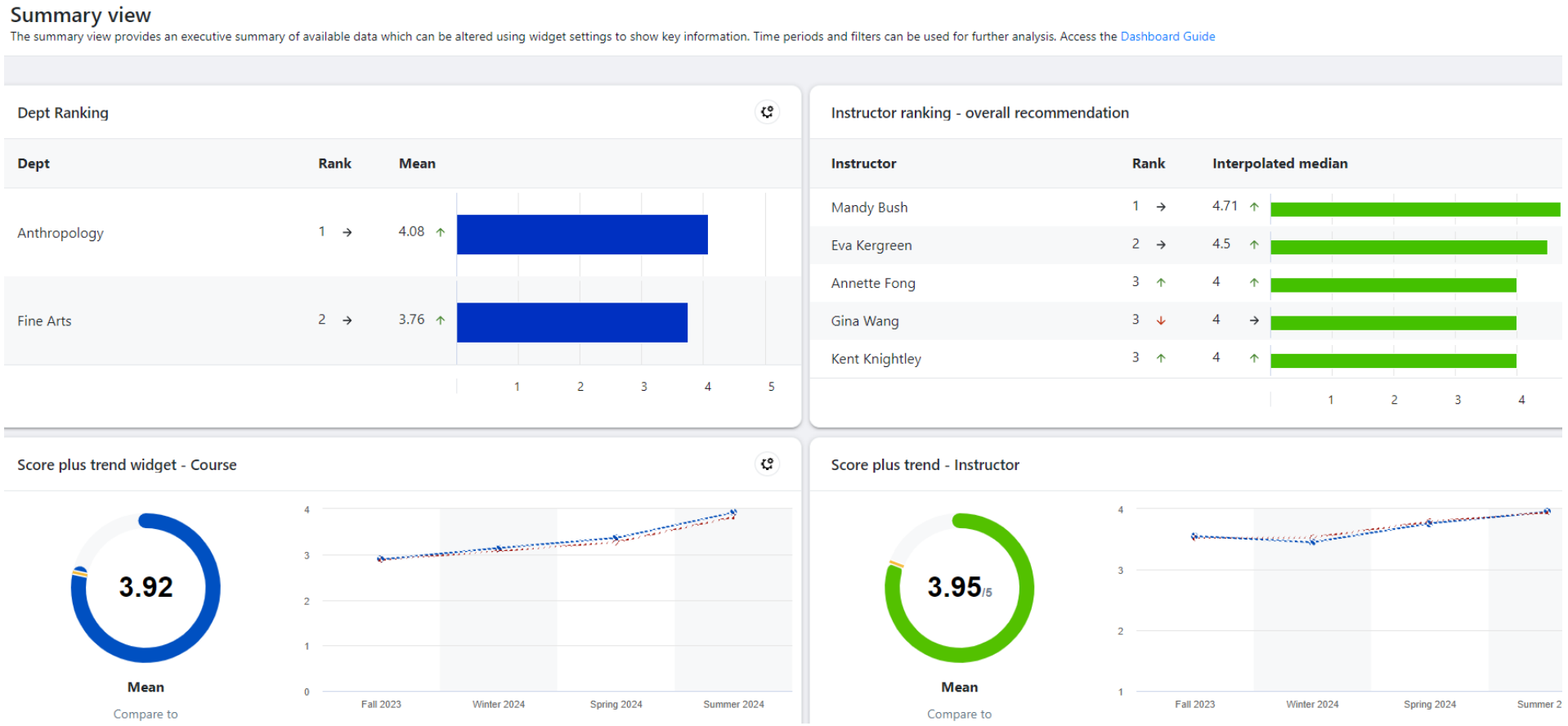
By user: Academic leader



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Handling the Decentralized scenario

- Where evaluations are run by each academic unit (perhaps even using PM role)

- Administrator can set up BD :
  - Add all projects
  - Create Question Groups based on each units' questionnaire - trend charts will not appear for users with no response data
  - Summary view widgets will appear with no response data
    - Could create different hierarchies for each Dept or
    - Create different roles for each group

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Addressing Data Exclusion

- When viewing needs are different between Individual vs Aggregate, School to School or to support policies that need to exclude certain subjects/secondary subjects from reporting/Dashboard

➢ Consider configuring separate BDs and using the Admin Data Selection to refine the dataset

Example: At our institution, evaluation data of tenured professors are not shared with academic leaders, but we wish to share with the professors themselves

➢ Configure separate Dashboards for Individual and Aggregate access accordingly and use Data Selection on the Aggregate to exclude data from tenured professors

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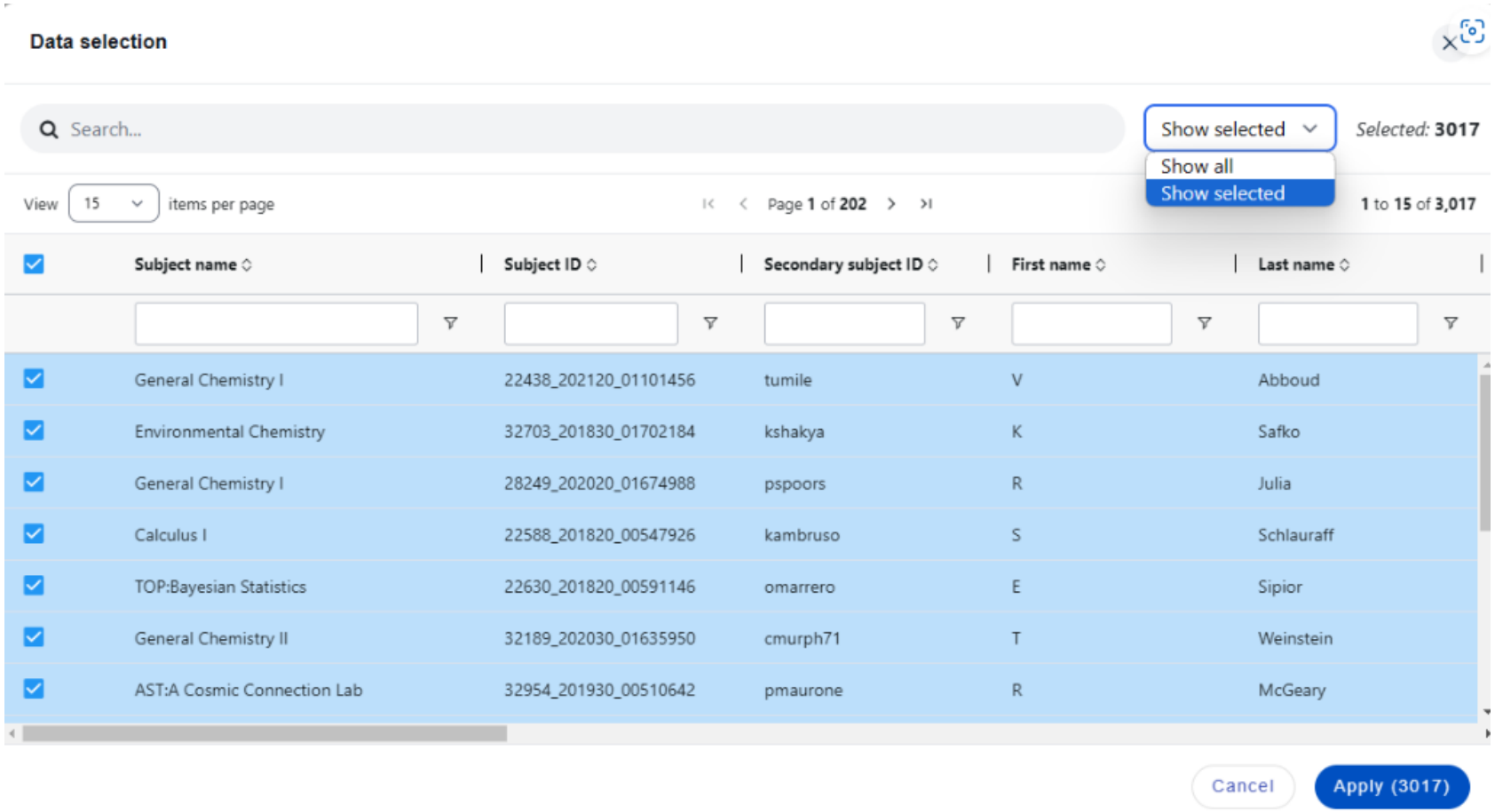
Addressing Data Exclusion



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Bonus scenario

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Polling Question

Are you currently running other surveys in Blue, such as Student services, Student experience or staff performance dialogue etc?

- Yes
- No
- I just got an idea, so planning to!

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Student Services Survey Scenario

An institution would like to run a survey and be able to show the results in a Blue Dashboard.

- Survey projects are not supported by the Dashboard. But…
  - A Survey using a Subject definition is supported
  - A Survey using a Primary multiple secondary definition is supported

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Student Services Survey Project setup

Example:

A Student Satisfaction Survey where a student will evaluate the general logistics and the services that he/she used during the term.

1. General questions about the student experience (Primary)
2. Questions about the services used by the student (Secondary Subject)
3. Secondary Subject Selection section

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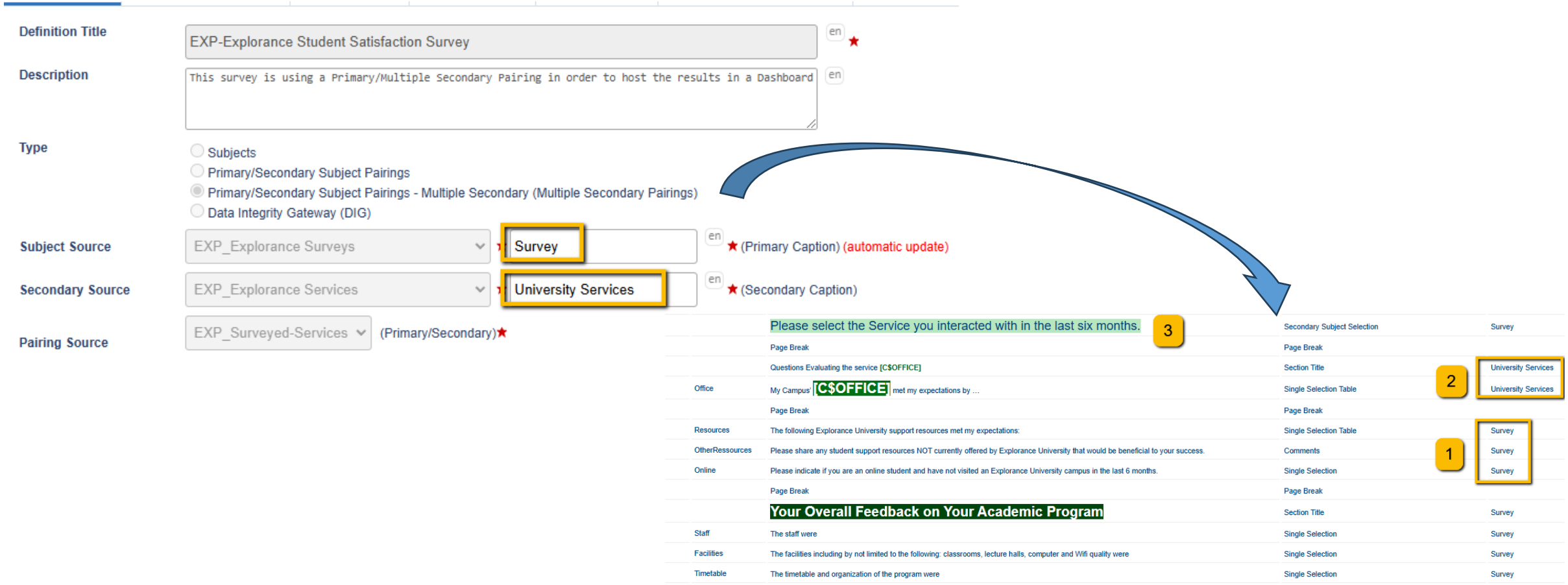
Project setup



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Project setup cont'd

Your Overall Feedback on the University Services

Now we are going to ask about your experience receiving support from specific offices at your niversity of Explorance campus over the last 6 months.

The following guide may help you remember with which offices you interacted.

- Admissions & Registrar: Enrolling in courses, verifying grades, ordering transcripts, updating your student record, enrollment
- Career Services: Job search, interviewing skills, professional-readiness workshops
- DEI Office : Diversity Equity and Inclusion advisory
- Financial Services: Applying for student loans, scholarships, and other funding
- Foreign Students : Help for Foreign students on housing and academic needs
- Student Services: Coaching for success, requests for a leave of absence or program drop/transfer
- University Library: Houses research materials for your course assignments; assists with research, finding writing-skills

Please select the Service you interacted with in the last six months.

Please select University Services

- [x] Admissions & Registrar Office
- [x] Career Services Office
- [x] DEI Advisory Office
- [ ] Financial Services Office
- [ ] Foreign Students Office
- [ ] Student Services Office
- [ ] University Library Office

Student selects the offices to evaluate

Your Overall Feedback on Your Academic Program

The staff were

- ○ Unhelpful
- ○ Helpful
- ● Very helpful
- ○ Extremely helpful

The facilities including by not limited to the following: classrooms, lecture halls, computer and Wifi quality were

- ○ Inadequate
- ○ Adequate
- ● More than adequate
- ○ Extremely adequate

How likely would you recommend Explorance University to a family member/friend/colleague based on the Quality of student support services.

Very Unlikely — Very Likely

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ 5
- ○ 6
- ○ 7
- ● 8
- ○ 9
- ○ 10

An NPS Score Question

Finally, please share any suggestions for how we can continually improve the Explorance University student experience.

To enhance the student experience, consider introducing regular feedback sessions where students can share their concerns and suggestions. This would create a platform for open communication and allow the university to address issues promptly.

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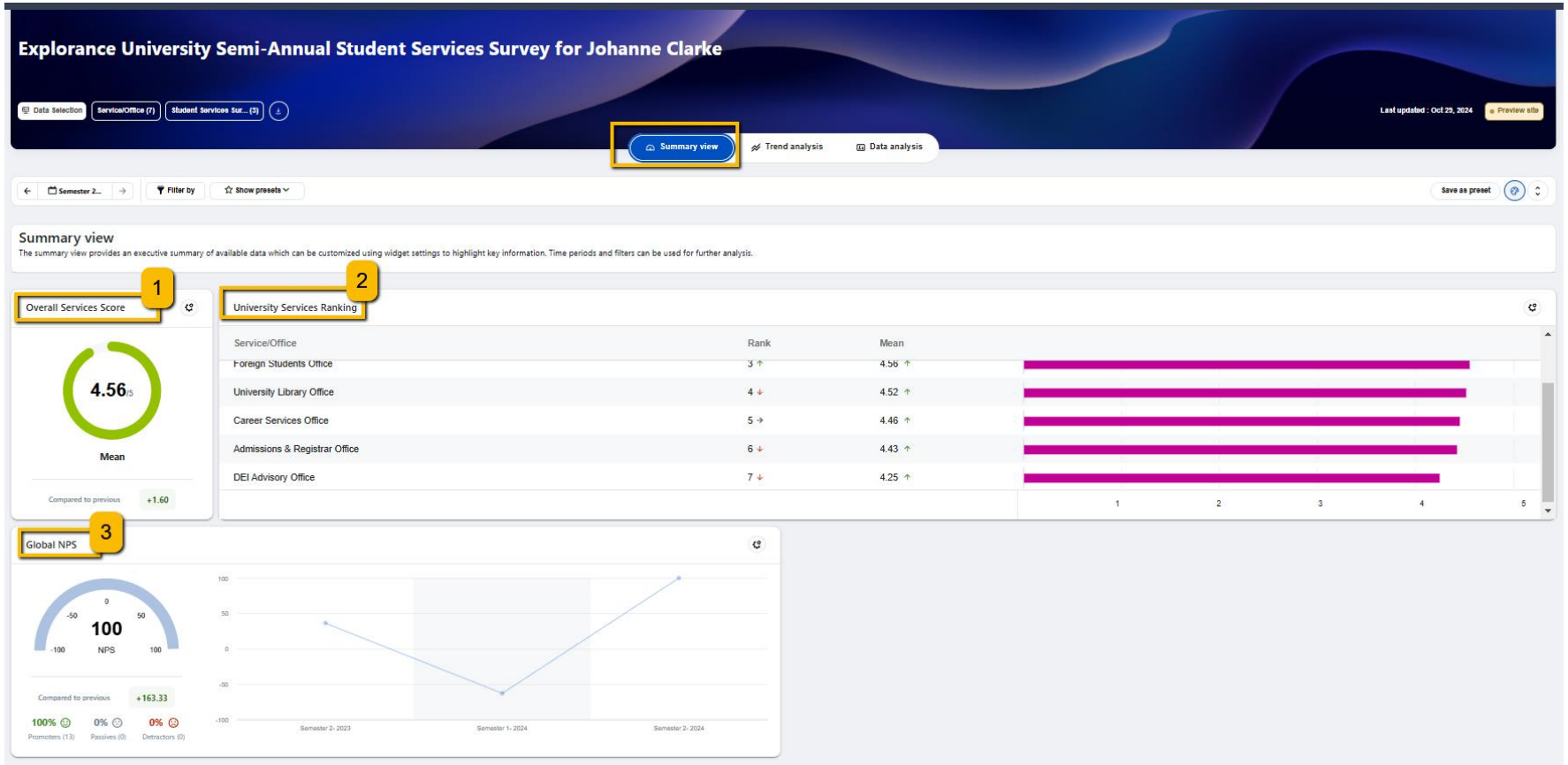
Result in Dashboard: A wealth of insight

The Summary view shows:

- The Overall score for the services this Semester
- The ranking of each service, compared to previous
- NPS score



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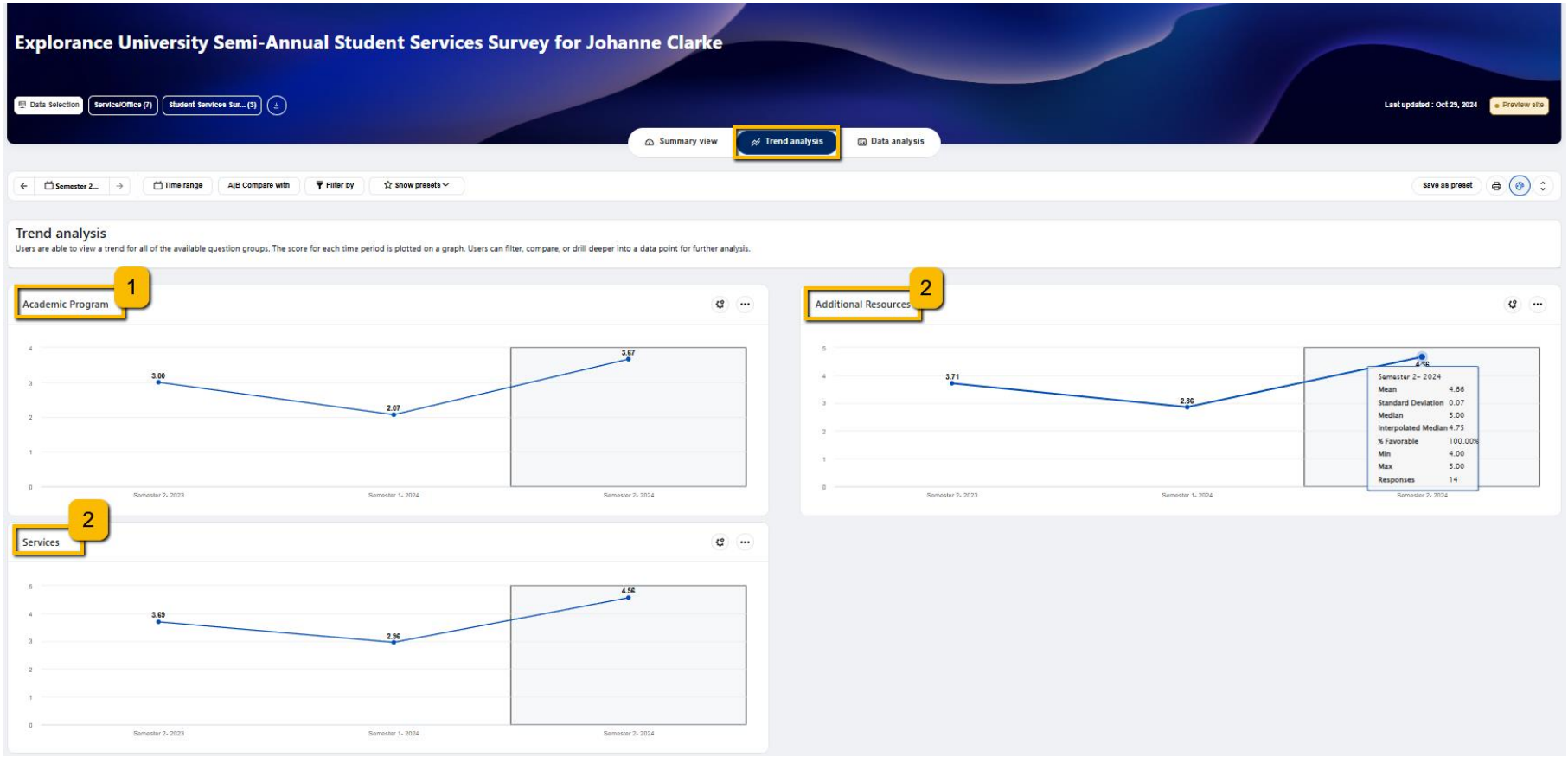
Result in Dashboard: A wealth of insight

In the Trend Analysis:

- Questions can be grouped under the same theme AND/OR viewed individually



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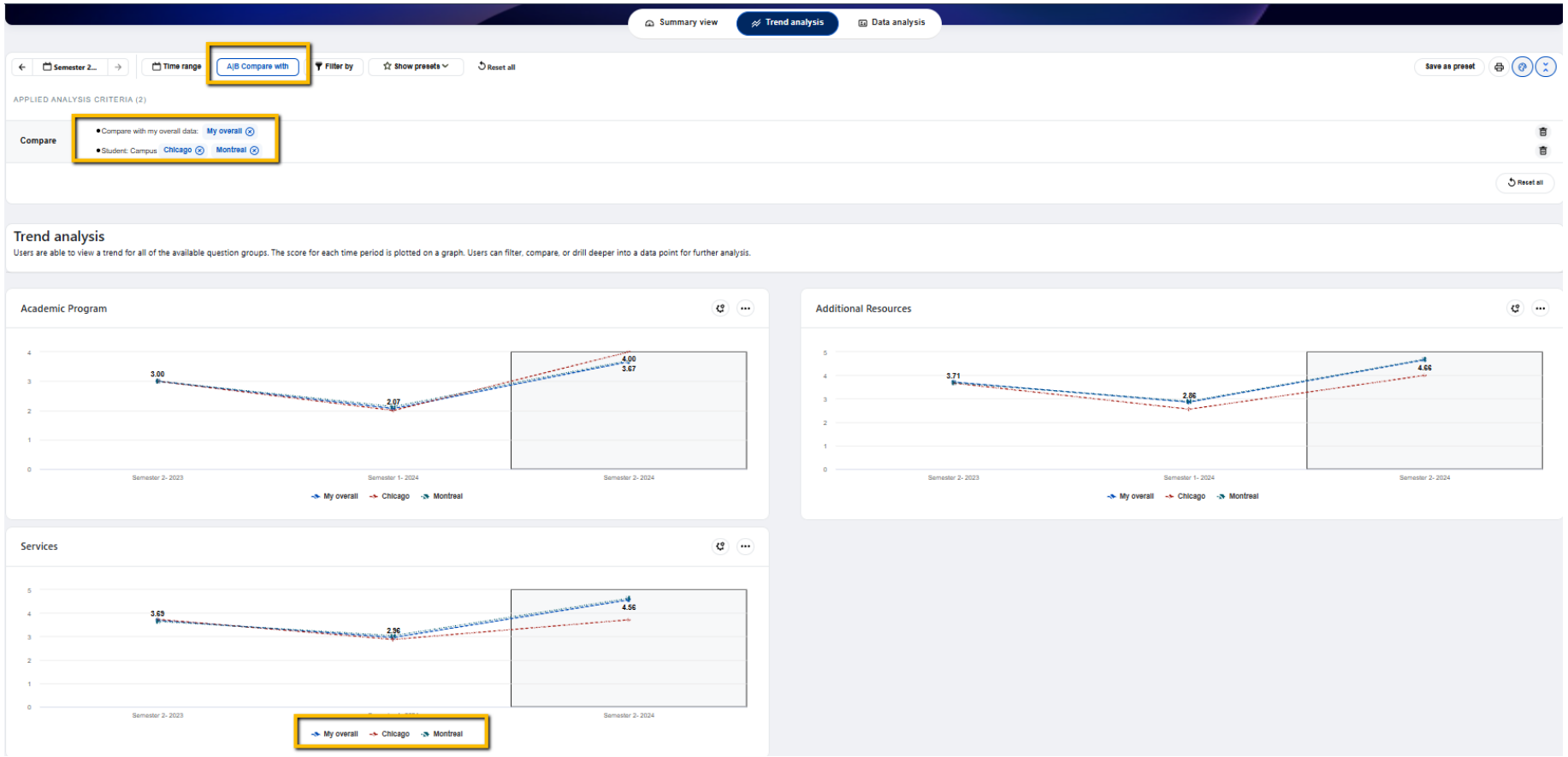
Result in Dashboard: A wealth of insight

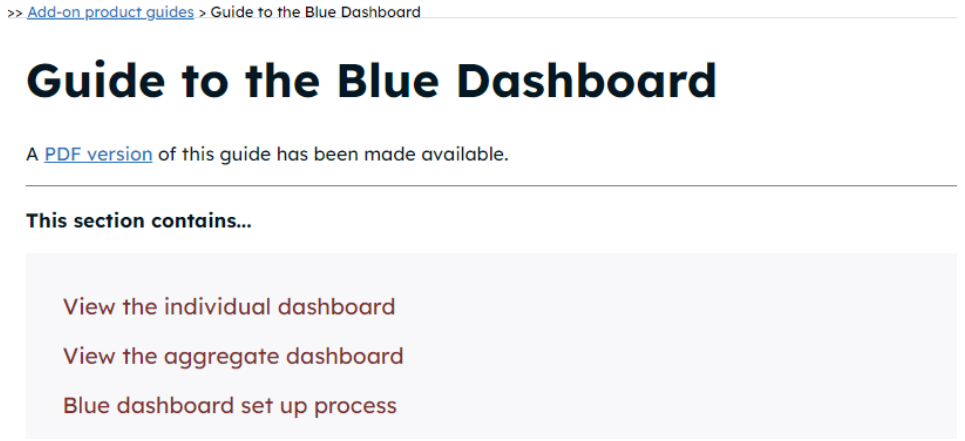
Compare by Respondent Demographic

- Compare responses from students at different campuses

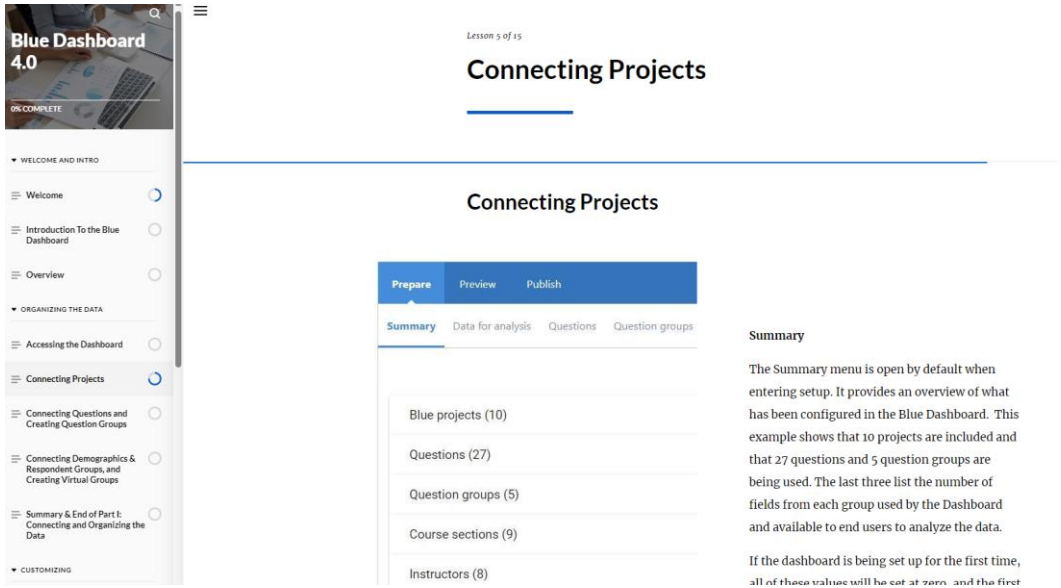


Resources

Help Centre: [Guide to the Blue Dashboard]



Training module (~1.5 hrs duration) available via [Smarteru LMS]



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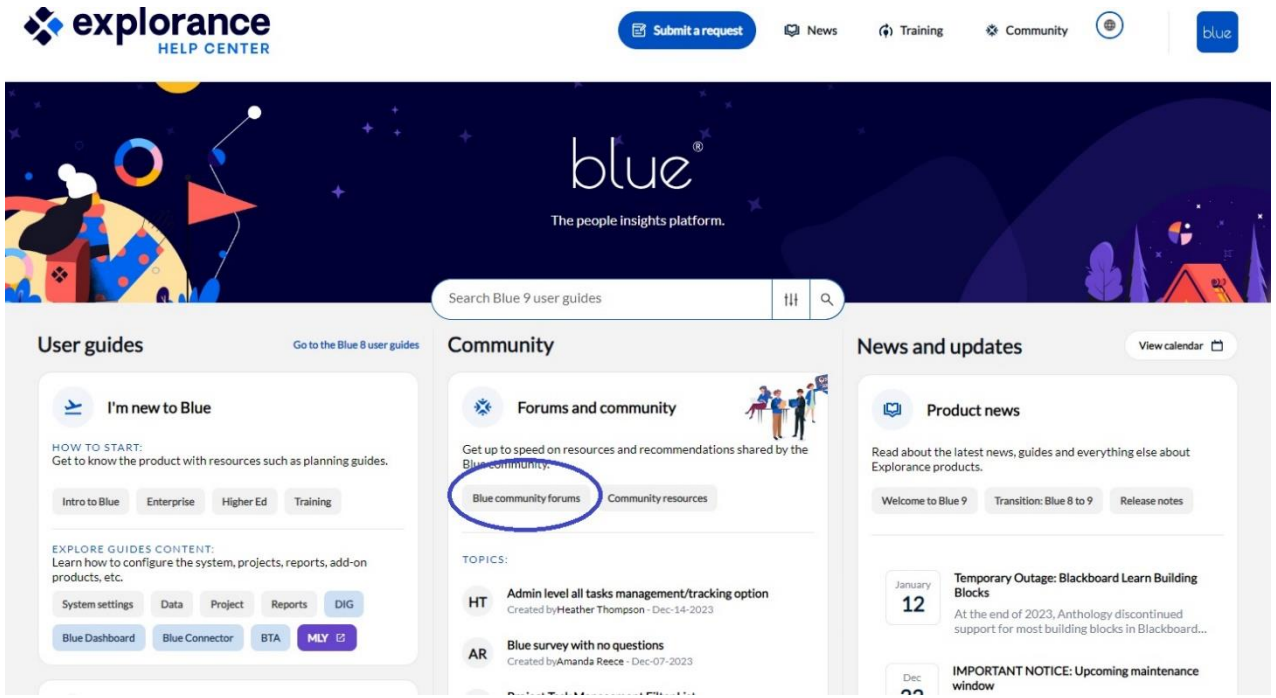
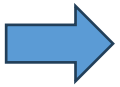
Community resources





[Learning Webinar - Questions, Discussions, & Post-Webinar Follow-up] November 6: How Best to Customize Blue Dashboard to Inform Your Decision-Making and Improvement Actions

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Join us for the next one!

- November 20: Ask an Expert! About Blue Dashboard, Reports, Analysis, and Report Distribution

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Thank you!

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