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advocate

**How Macquarie University
implemented the Symplicity
Advocate solution to create
a 'student first' approach to
student care and reporting**

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How Macquarie University implemented the Symplicity Advocate solution to create a 'student first' approach to student care and reporting

It has long been on the agenda for Macquarie University to digitalise student service areas to achieve higher degrees of efficiency while at the same time improving the student experience and engagement. Kylie Ebert, Director Student Life at Macquarie University has driven the initiative to adopt both Advocate and Access across the student service departments. This has been done in order to breakdown data silos and to better equip Macquarie to proactively identify students at risk and to support early intervention. Macquarie University went live with Advocate in June 2020.

Macquarie University Institutional background for case management and reporting

Prior to implementing Advocate, Macquarie University had an online reporting tool for sexual assault and sexual harassment matters, which was based in Salesforce. While CRM platforms can be configured to support case management processes and workflows, they cannot support the data segregation required for the complex cases universities handle, due to their architecture being built on the premise of easily sharing information with everyone. Salesforce offered good capabilities at capturing a new report but lacked the tools and workflows required to manage complex cases. The shortfalls within Salesforce resulted in Case Managers needing to share confidential information via email. Sharing confidential information via email not only exposed the university to data privacy risk but it also introduced major complications and challenges should the university be required to present a full case report or hearing packet to TEQSA or other authorities.

There were also some inefficiencies which needed to be addressed, such as improving existing processes and ensuring the right stakeholders were involved and well informed in solving complex issues for students.

"Recordkeeping, confidentiality and the audit trail were things that were incredibly difficult for us to manage via email trails. Somebody would copy somebody in, but not someone else, and you spent an awful lot of time in the initial response just trying to piece together information. And then as these matters continued, people dropping in and out and not all having the same view or the relevant parts of the thing that they need to know. It became very, very difficult for us,"

said Kylie Ebert, Director of Student Life.

"We also had a number of longstanding and complex matters that had also gone to external agencies, such as the Ombudsman that were still seeking resolution. And obviously, we're very aware of compliance requirements and the need for us to be ready in a year or two's time and have a really sound and demonstrated track record of supporting our students,"

added Ms Ebert.

Key drivers behind Macquarie's decision to implement Advocate

Macquarie were looking for a holistic, university wide solution to support their student-centred approach, with superior reporting capabilities. There were challenges with staff who were unsure as how to classify or report certain matters; there was confusion if it was a student matter, if it should be reported, and who it should be reported to.

"In starting the project, the emphasis was on removing the barriers, both for students and staff, and to really support the normalisation of seeking help. There were lots of students who weren't asking for help, weren't reporting things, weren't expecting a solution to be forthcoming, and so we were wanting to address that,"

said Ms Ebert.

"Our priority is to support the student, and to make sure that if an incident arises, everyone involved has recognised that some incidents are quite complex and involve many people – we want to make sure everyone's safe and is getting assistance as needed. And then there's obviously things that flow on after that initial response,"

said Ms Ebert.

One of the gaps identified in Macquarie's existing RNA reporting tool was the lack of workflows and action plans. The CARE Network of Advocate was able to fill this gap, with the ability to create personalised action plans for students of concern, with reliable tracking, reporting and allocation of these plans to staff across different departments. The structured workflows in Advocate allow staff to manage the different case types and monitor the progress of their assigned incidents throughout all stages of the process.

Managing the Advocate implementation process and IT integration

The implementation process started in October 2019 and required a lot of project management skills to involve all stakeholders across multiple departments within Macquarie University. One of the areas which really worked out well for the project team, was the support at the senior executive levels for the project to succeed.

"In our initial workshops we had with Julie Stokes, our Symplicity Implementation Manager, we had a session with probably about 30 or 40 stakeholders from around the university, and it was a really great moment when the Deputy Vice Chancellor Academic at the time really spoke so highly of what we were trying to achieve in this project,"

said Ms Ebert.

To enable co-ordination with the IT department in Macquarie, an IT Project Manager was assigned to ensure the milestones were kept on track to meet the implementation schedule. There was also operational IT support available for Advocate, which was a new initiative for the Student Life portfolio, as previously they hadn't been supported by IT resources. This was the catalyst for the creation of a new operating model for the team to work closer with the IT team, which has seen many benefits, including the automated daily integration of data with the Student Management System to ensure student data remains current. The team felt that this was a significant step forward for the University.

"Advocate has become a fantastic data tool we're not actually as nimble getting things out of our student system as we are with Advocate at the moment,"

said Ms Ebert.

How the university is using Advocate for case management and incident reporting

Macquarie officially went live with Advocate in June 2020, launching with Care Reports and also inappropriate and unwanted behaviour. The team decided to take a broader view of sexual assault and sexual harassment and cover all other types of unwanted behaviour such as discrimination, bullying, and inappropriate conduct online, providing greater operational transparency. The Incident Report module is operating through the complaints, appeals and discipline team.

Macquarie are leveraging Advocate to manage; Complaints, Academic Integrity, Academic Appeals, Behavioural Misconduct, Safer Communities and Sexual Misconduct Cases, Early Intervention and Wellbeing, Student Advocacy, and Automated Case Routing across various departments and teams. Macquarie are also utilising and Care Scoring allowing the system to automatically generate a list of priority students and cases for pro-active intervention and support.

Currently, there are 70 Advocate users across Macquarie, with many more who actually receive the reports. The main users are in the Student Wellbeing, Student Diversity and Inclusion, Complaints, Appeals and Discipline teams. Over 500 reports were created within the first two months of the system being live, this is due to the team being very successful in promoting the benefits of Advocate to staff as an enterprise-wide reporting tool.

“We’ve had strong engagement from other teams around the university, including the Health and Safety team, Security, Risk and Compliance, and faculties. We’re now involved in discussions with some of our colleagues who organise overseas placements, and exchange programs. So, all of those areas where they are likely to deal with student matters are now well aware of this as our first and foremost reporting tool for student matters and they know they can report into it. Anyone can report. It can be a public report, a staff report, a student report, and that there’ll be an immediate response to that,”

said Ms Ebert.

Leveraging Advocate for process enhancement and improvement

One of the main outcomes Macquarie have achieved has been consistency in their approach and actions to dealing with student case matters and support requests. The Advocate project provided the team with an opportunity to review and refine many of their templates, letters, and policies, particularly in the sexual assault and harassment areas.

The Student Life team have improved their IT project management skillset and have also benefited from working with IT subject matter experts during the implementation process. The ongoing benefits of developing a partnership with IT has also been a great win for the team. The Student Life team have implemented a more adaptive response to IT matters, with daily stand-up meetings, weekly check-ins and regular check-in meetings with the Symplicity team. This allowed everyone to work through issues and challenges as they were identified and all parties were able to work through any roadblocks by reprioritising and adapting where needed.

Macquarie's approach is a student-first, care-orientated response, and Advocate has greatly assisted the University to demonstrate this approach, with institutional reassurance and transparency for a quicker and more thorough resolution of case matters.

Improving internal communications for staff and students around incident reporting

Advocate has been set up for success within Macquarie off the back on a well organised internal communications campaign. It was promoted widely to staff and students via a new website for an improved user experience.

Subject matter experts Penny Huisman, Manager, Student Diversity and Inclusion and Kim Carmody, Student Support Coordinator, were the spokespeople for the campaign in various staff videos. They coined the tagline 'Just report it, we'll sort it' as a way to encourage staff to report issues that might be of concern. The team is putting an emphasis on encouraging staff to report their concerns, and leave determining the policy and if is something that needs progressing to the Student Life team, as they are the experts. Already, the Student Life team has seen an increase in their initial response time to reports received from Advocate, as they can now review and include the relevant stakeholders at a much quicker pace.

Looking forward – Macquarie's roadmap for Advocate

Macquarie have a lot of exciting enhancements on the product roadmap for Advocate, as they look to leverage more of the functionality of the product to help underpin the universities 'Student's First' approach. Student Life are going to look at involving academic integrity and gaining more involvement from the complaints, appeals and discipline departments. The Student Life team have already started scoping out to see if they can include academic appeals in Advocate. This has allowed the team to identify the gaps between system functionality and organisational readiness, and also to identify any issues they need to address first; such as policy matters.

The Student Life team are looking to see how Advocate can be used more in supporting students ongoing placements and success plans.

"Moving forward for students' success planning, for academic progression, and versions of the Care Action Plans are on the list for us as well. Leveraging the value of more detailed reporting and analytics that you can get from the system to form a much clearer view of what the systemic issues are, that we might be closing the loop back on for the policy situation. And that's really enhancing that continuous improvement approach that, again, everybody talks about but is very, very hard to deliver in practice,"

said Ms Ebert.



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