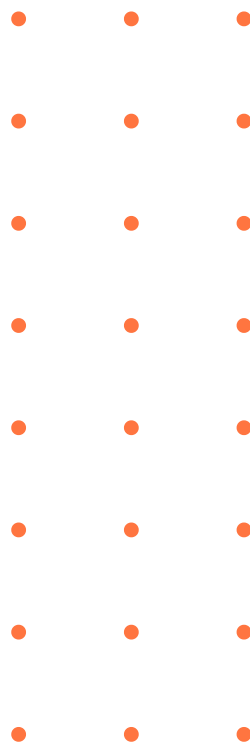


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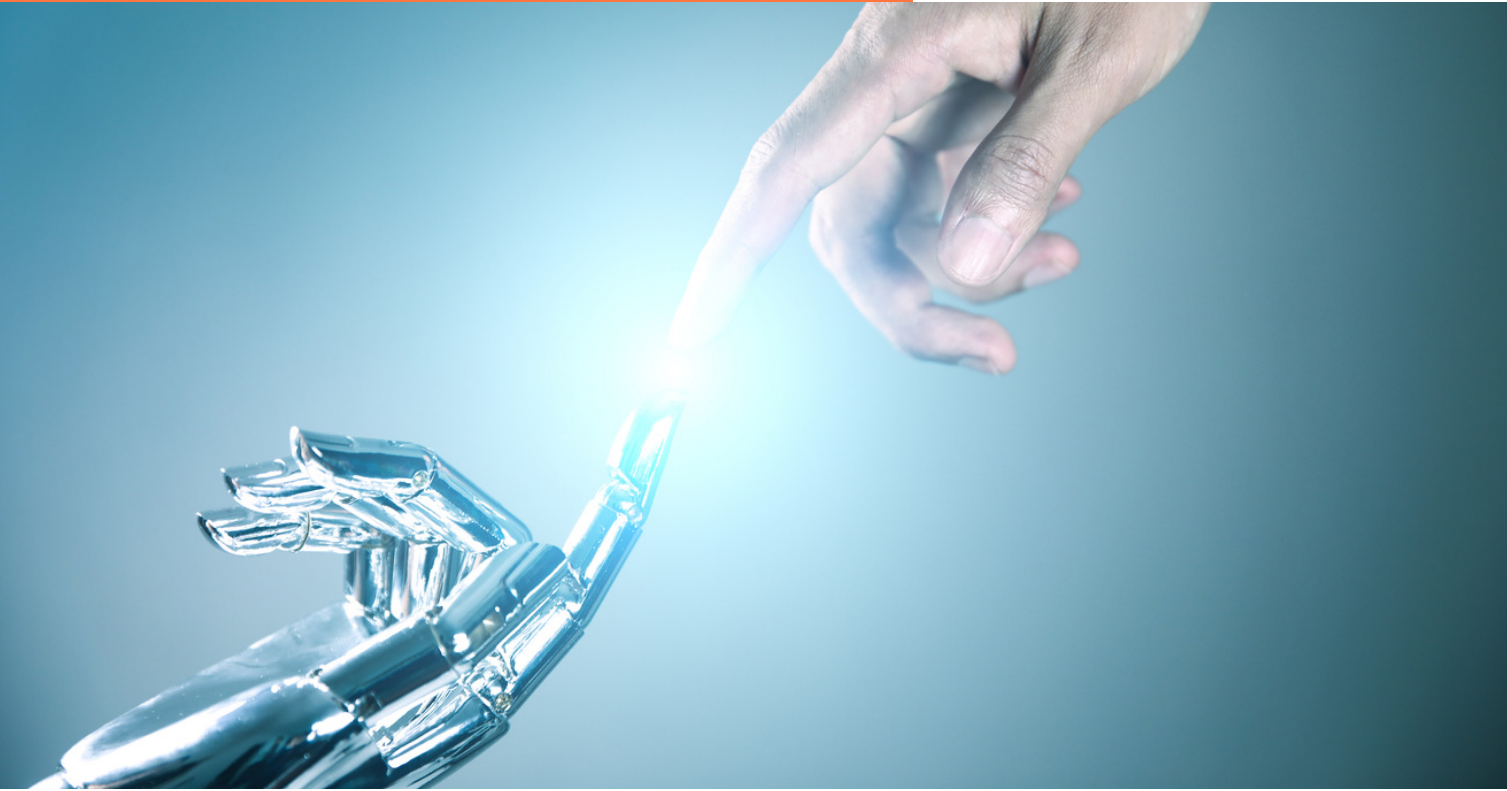
# Six AI Project-Prep Steps for Higher Education



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# INTRODUCTION

When planning your AI Project, do not let the letters A and I intimidate you. Yes, you will need a couple of extra steps for an AI Governance plan; however, this is still essentially a technology project where you will need your institution's IT implementation best practices to ensure project success. Here are the six steps to take for your AI Project planning even before selecting the technology you will use.

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# 1. CHOOSE AND DEFINE YOUR USE CASE

For Higher Education, Educause has provided a [Future Action Roadmap](#)<sup>1</sup> specifically for AI. If you have completed this, then pick just one, at most three, high-profile use cases where the need is most urgent. Use Cases identified as having the highest impact with the biggest potential return include:

- Predicting student behavior and outcomes to identify **students at risk**.
- Personalized student learning programs and support services to help **increase retention**.
- Segmenting, targeting, and recruiting students most likely to succeed in your programs.
- Personalized and engaging marketing campaigns can increase enrollment awareness, interest, and conversion rates.



In March 2024, Scott Sorenson, Executive Director, Data Privacy & Analytics from the University of Alabama at Birmingham, shared their AI pilot using [Tableau Pulse](#) at the [Data Analytics Alliance for Higher Education](#).

They focused on use cases for the Marketing Department and Advancement Department. Lessons learned from the UAB pilot:

- Get the interested teams involved early and define the roles each will play.
- Develop air-tight use cases founded on strong business reasons.
- Even if business reasons are solid, leave plenty of time for executive iterations and approval.
- Developing AI and Data Governance will take twice as long as you think it will.



## 2. DON'T DELAY YOUR AI GOVERNANCE AND SECURITY

AI governance and security must be a strong focus at the beginning of your AI journey, as they are the foundations of your institution's success. Things to consider:





- **Ethical Considerations:** All policy decisions should align with ethical principles and the DNA of who you are as an institution. Ensure transparency, fairness, and equity. Institutional leaders (Chancellor/President, Chief Academic Officer, Chief Information Officer) are pivotal in driving ethical AI practices.
- **Senior Management:** Define roles, responsibilities, and accountability related to AI governance and ensure that senior management oversees AI initiatives.
- **Risk Assessment and Iteration:** Regularly assess risks associated with AI implementation and adjust policies accordingly.



- **Data Security and Privacy:** Data handling and privacy protection will help keep your student and staff data safe. Mistakes made with the mishandling of personal data can have profound consequences, so it is imperative to put guidelines and best practices in place for collecting, storing, and processing data used in AI systems.
- **Transparency and Accountability:** Not surprisingly, AI has the same biases as its human counterparts. Make AI algorithms and decision-making processes transparent with regular reviews, carefully define responsibilities, and hold accountable AI system performance and outcomes.







## 3. IT'S ABOUT THE DATA

You will need to assess the data in legacy systems to determine AI readiness. Because AI consumes large datasets with its Large Language Modeling, a [Unified Data Platform](#) will also be needed to collect, store, process, analyze, and share your data with data visualization tools. Is your data dependable, relevant, complete, and diverse? The team may need to work on data-source systems before choosing the AI solution. The Data sources needed will depend heavily on the use case. Common data-source systems used for AI tools include:



- **Student Information Systems (SIS)** – Information on admissions, enrollment, grades, and financial aid will be essential for Student Success analysis.
- **Learning Management Systems (LMS)** – Data from platforms like Canvas, Blackboard, or Moodle that facilitate online learning, course management, and distribution of educational content will be necessary for AI-suggested learning programs personalized for each student's success.





- **Human Resource Systems** – These systems manage employee data, payroll, benefits administration, and staff recruitment processes, all necessary for AI analysis of Department programs and resource planning.
- **Vendor-based Systems** – Specialized software holding data for recruitment, student success, assessment, space management, and more.
- **External Data Sources** – Registers, databases with scientific information, and other external systems that can support AI in enrollment, recruitment, marketing, and student success analysis.





## 4. CHOOSE YOUR AI SOLUTION

These steps are in this order for a reason. Your team can now make an informed decision about AI technology based on use cases, data sources, and governance. The questions to ask:

- What type of AI solution best suits your problem or opportunity? The areas with the most significant impact on securing your institution's future success are typically Student Success, Enrollment, and Retention. The market is catching up quickly with [AI offerings to support these initiatives](#).
- Do you want to build your own solution from scratch or use an existing solution from a vendor or a partner? The old rule of buy to compete, build to differentiate still applies to AI Projects. Buying off-the-shelf (OTS) AI solutions should be where you start. It is still the lowest-cost entry to AI. Building your own should be for ambitious projects where no other OTS solution exists for an identifiable, market-differentiating AI use case.



## 5. DEFINE THE KEY PERFORMANCE INDICATORS (KPI)

Defining KPIs will determine how you build the solution. Common metrics used in higher education include the following:

- Number of student minutes on a website – Does it lead to a greater conversion percentage to enrollment?
- Year over Year (YoY) percentage of resources used by at-risk students – Does it correlate to a YoY percentage increase in student retention?



Setting KPIs will guide improvements toward success and ensure the Leadership Team that your investment in AI is seeing the hoped-for impact on enrollment, retention, and student success. What are the key performance indicators (KPIs) you will use to track its progress and results?





## 6. PLAN YOUR IMPLEMENTATION

You've determined the data needed from each system, but now it's time to consider how you will [integrate and unify your data into a usable format for AI Analytic consumption](#).

Keep in mind, just because the letters A and I are in front of your project, it is still an IT project, and the best practices for this have not changed much in the past couple of decades. Bring all the lessons learned at your institution, your institution's developed best practices, and industry [PMO Best Practices](#)<sup>2</sup> to this project, as you would any project.



# RESOURCES

[Datatelligent Platform for Higher Education](#)

[Tableau Pulse](#)

[Snowflake - Datatelligent](#)

[Data Analytics Alliance for Higher Education](#)

# CITATIONS

1. Jenay Robert and Nicole Muscanell, 2023 Horizon Action Plan: Generative AI (Boulder, CO: EDUCAUSE, 2023) [2023 EDUCAUSE Horizon Action Plan: Generative AI](#)
2. Abudi, G. (2011). Developing project management best practice. Paper presented at PMI® Global Congress 2011—North America, Dallas, TX. Newtown Square, PA: Project Management Institute.  
<https://www.pmi.org/learning/library/project-management-best-practice-organization-6167>








# Datatelligent

## ABOUT DATATELLIGENT

Datatelligent, a data analytics firm, enables the use of data to make our communities better. Our unique approach, Data Analytics as a Service (DAaaS), helps remove barriers for organizations to make data-driven decisions.

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