Lumina Grant Progress Report for June/July 2014

Work in June and July focused on service design and sustainability research, developing a project plan for building the technical infrastructure for this service, and incorporating all maturity and deployment indices into the 2014 Core Data Service survey. Activities included:

- In mid-June we finalized the inclusion of seven maturity indices and three deployment indices into the 2014 Core Data Service survey. Upon the close of data collection in October of 2014 we will be able to assess maturity and deployment for the following:
  - Maturity
    - Analytics
    - E-Learning
    - Information Security
    - IT Governance
    - Research Computing
    - Risk Management
    - Student Success Technologies
  - Deployment
    - E-Learning
    - Information Security
    - Student Success Technologies

We believe these data will provide a sufficient basis for our prototype strategic IT assessment report.

- In mid-July we conducted four focus groups with CIOs at a cross-section of institutions. The goals for these focus groups were to:
  1. obtain customer feedback on the broad concept of the strategic IT assessment service and its value proposition
  2. understand what participant institutions are doing today in the area of IT assessments, and identify gaps and needs
  3. identify gaps and needs not accounted for in the service/tool design
  4. obtain a refined sense of who our customers are for this service
  5. understand how we should package and price the service

Through this research we determined that institutions are currently using a combination of in-house and external assessment tools and verified that our planned IT assessment report would be both operationally and strategically valuable to CIOs. We also determined that users will be unable to help us accurately assess pricing and service packaging until they have a concrete example of what they’ll be getting for their money. For this reason, we plan to research pricing strategies in late 2014/early 2015 when we have a prototype of the SITAR report to show users.
In June we met with Pinnacle Solutions, Inc. to discuss our technology requirements for providing this service. In July, Pinnacle provided us with a cost estimate and project plan. We expect to slowly ramp up this work through the end of 2014, with the bulk of development work taking place in 2015. Our goal is to have a production-ready service for the EDUCAUSE annual conference in October of 2015.

Higher Education Research Briefs. We have identified four higher education research briefs to produce, one more than originally specified. The topics are: personalized pathways, online learning, administrative IT, and information security. Each brief is constructed as a series of 4-5 questions college presidents or other institutional leaders might be advised to ask, accompanied by EDUCAUSE data with which they can compare their institutions. Three of the four briefs have been completed. All will be available in time for the EDUCAUSE annual conference. The briefs are paired with longer primers on each topic for those who wish to learn more. To achieve widespread dissemination, we intend to:

- Create a focus page on our website to house the briefs
- Infuse outreach about the briefs into the various existing channels, including the ECAR and ELI programs, the EDUCAUSE newsletter, and specific communities of practice as relevant for each topic.
- Integrate the material into our 2015 EDUCAUSE Connect conferences and possibly Institute (i.e., EDUCAUSE leadership) programs
- Either feature the briefs in an upcoming EDUCAUSE Homepage or find a similar mechanism promote it on our website
- Select either the e-learning or personalized pathways brief to be shrink-wrapped with the upcoming EDUCAUSE Review issue that focuses on new models in higher education, depending on which is closest to the final articles published in that issue
- Do an E-Live EDUCAUSE webinar later in the year to promote the entire package

**Project Status:** On track

**Risks, Issues, or Concerns:** None

**Priorities for August:**

- **Research**
  - Create complete mockup of the strategic IT assessment report.
- **Development**
  - Begin work with Pinnacle Solutions to develop infrastructure for new service.
- **Sustainability**
  - Prepare overview of sustainability options for discussion with the EDUCAUSE board.
- **Administrative**
  - Tracking and reporting as agreed upon.

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1 We could complete more development in 2014, but deferring much of it until 2015 will enable us to realize significant savings in software licensing and hosting costs. This new schedule does not endanger our service go-live date.