Lumina Grant Progress Report for September-December 2014

SITAR (Strategic IT Assessment Report)

Work through the end of 2014 focused on finalizing a prototype of the strategic IT assessment report (SITAR), conducting focus group research at the EDUCAUSE annual conference, and planning for the next phase of this project. Activities included:

- Finalizing the SITAR prototype (attached). The final SITAR report contains four main sections:
  - **Peer Group Characteristics** - This section provides an analysis of demographic characteristics of the peer groups used in the report and can be used to determine similarities/differences between the peer groups and the institution requesting the SITAR report.
  - **Findings and Recommendations** - This section provides a high-level view of an institution’s strategic priorities, IT goals, and assessment of supporting IT capabilities.
  - **Institutional Strategic Priorities** - This section links strategic priorities to IT capabilities and provides a detailed assessment of each capability.
  - **IT Operational Assessment** - This section links IT goals to IT capabilities and provides a detailed assessment of each capability.

- At the EDUCAUSE annual meeting, Leah Lang and Ron Yanosky presented “Transform IT with a New Generation of IT Assessment Tools” to a room of approximately 70 individuals. Through an interactive poll, audience participants indicated that communicating the value of IT is very important, however most audience participants were not currently measuring the value of IT. At the end of the session, most audience participants indicated that they were excited about using Maturity and Deployment Indices, SITAR, and CDS to measure the value of IT. The session can be viewed by logging into the EDUCAUSE website and visiting: [https://www.educause.edu/annual-conference/2014/transform-it-new-generation-it-assessment-tools](https://www.educause.edu/annual-conference/2014/transform-it-new-generation-it-assessment-tools)

- During the EDUCAUSE 2014 annual meeting in Orlando, Florida, EDUCAUSE research staff conducted three focus groups with senior IT leaders. Participants were provided a prototype of the Strategic IT Assessment Report (SITAR). Major goals of the focus groups were to:
  - identify SITAR use cases;
  - get feedback on SITAR format and features;
  - identify concerns about SITAR; and
  - identify implications for SITAR service design.

These focus groups resulted in the following key findings:

- Major use cases included institutional strategic planning and assessment, fostering targeted conversations between IT leadership and other executives, IT benchmarking and planning, and supporting high-stakes external evaluations such as board reviews and accreditation.

- Participants almost unanimously expressed concerns about the length of the SITAR report, and encouraged aggressive use of summaries and graphical content. At the same time, they acknowledged the need for backup detail.

- Focus groups noted that they wanted to be able to provide selected information from SITAR to particular parties. There was little interest in sharing the full report. Many
participants advised that SITAR contains sensitive information, and expressed the need to contextualize results for cabinet officers and other parts of the organization.

- Maturity indexes and strategic assessments were identified as the two most valuable analytical components of the SITAR report.
- There was strong interest in support services for helping understand, interpret, and present SITAR results.
- A modular, piece-by-piece rollout of specific tools starting sooner was strongly favored over a later introduction of a more comprehensive SITAR assessment service.

- In October, the EDUCAUSE project team met to discuss focus group feedback and plan for the next phase of the project. Given the focus group results, EDUCAUSE plans to shift focus to the Maturity and Deployment Index portion of this project and work on developing a pilot service in the second quarter of 2015. We also plan to continue to explore the viability of an IT Operations Assessment. The new plan includes:
  - Further research on service design - what, in addition to an interactive tool, would create a valuable user experience?
  - Interactive tool development - portal for assessing maturity and deployment for specific services
  - Pilot, assess, iterate tool and service design (includes further research on sustainability models)
  - Development and testing of an IT Operations Assessment report prototype
  - Development of additional Maturity and Deployment indices needed for CDS 2015 cycle

- The remainder of 2014 was spent finalizing content for the semi-customized maturity index reports which will be used in the pilot service in 2015.

**Higher Education Research Briefs**

- The Higher Education Research Briefs will be printed and shrink-wrapped for bundled delivery with the January/February 2015 issue of EDUCAUSE Review. That issue’s focus is the Top 10 IT Issues for 2015, which is perennially the year’s most popular article.
- EDUCAUSE continues to feature the briefs on our website
- We are using the materials in the briefs for ongoing outreach to higher education executives, most notably at the AASCU Winter meeting of Academic Officers in February 2015 and at DREAM 2015, the annual meeting of Achieving the Dream in February 2015.
- With a CEO transition announced in January 2015, development of additional briefs will be put on hiatus until the new CEO has an opportunity to consider their role in EDUCAUSE executive outreach.
- Our deliverables for this part of the grant are complete.

**Project Status:** On track

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

**Priorities for January 2015:**

- Begin work with Pinnacle consulting on portal development.
- Plan for additional content needed for CDS 2015.
- Start service design research to learn more about creating a robust and valuable user experience.
- Build prototype MI/DI reports for EDUCAUSE board members using live CDS 2014 data to get specific feedback about report content.