Lumina Grant Progress Report for January 2015

SITAR (Strategic IT Assessment Report)
Work in January 2015 focused on reconvening the ITABAB, kicking-off portal development work, and building prototype MI/DI reports. Activities included:

- Reconvening the IT Assessment and Benchmarking Advisory Board (ITABAB). The ITABAB is a group of senior IT leaders who are experts in assessment and benchmarking. They advise us on the direction of this project and how to create a valuable service. In January, through group discussions and one-on-one meetings, we worked with this group to get feedback on service design. In particular, we were focused on understanding their use cases and desired service features. Results are as follows:

  **Use cases**
  - Self-assessment.
    - Use it internally to make sure that perceptions of the organization are reflected in the data.
    - This is a valuable exercise for schools. Thinking through the question and process is extremely useful even if they don’t benchmark.
  - Readiness assessment to take on new initiatives.
  - Organizational improvement.
    - Identify gaps in service delivery and what is needed to move forward.
    - Use for strategic planning purposes and staff education.
    - Assist w/ prioritization of initiatives. What’s important enough to focus on and where do we want to focus and are we ready?
  - Grounding for decision-making.
  - Operational justification.
    - Justify jobs, complexity of jobs, and creating alignment with the institution.
    - Justify level of service and show the value of service.
  - Monitor progress.
  - Assess IT during organizational change.
    - Institutions can use this to show prospective CIOs the current state of IT.
  - Communication mechanism.
    - Share the data and reports with provosts/presidents/vice presidents to make sure they understand where IT is contributing and where effort is needed.
    - Seeking buy-in with other departments. Stakeholders want to see benchmarking and how to move forward.

- Desired service features
  - Answer key questions.
    - How do I move my institution from one maturity level to the next?
    - Why do I want to move from the level I’m at? Some areas I do not want to move - too much effort - what are the benefits? What do you get?
    - What will it take to move to the next level or address adverse conditions?
    - Who do I talk to?
    - What is the context around the numbers? I need to understand the data.
In what direction is the community headed? I’d like to know the trend that my peers are moving up the individual scales.

- Peer comparison
  - Custom peer grouping
  - Sort results by ranking in peer group
  - Find scores for peer institutions we benchmark against

- Advising component
  - Ability to call a service to get advice and ask questions about the data.

- Multidimensional view
  - Incorporation of additional data sources to see a 360 degree view of the service.

- Minimal customization required
  - Time available to analyze data is scarce. This tool should be usable out-of-box.

- Kicking-off development work. In January, Pinnacle Solutions set-up the infrastructure needed to start developing the MI/DI benchmarking portal. They also finished a project in which they re-designed the peer-grouping interface used by CDS and needed to operate the peer-grouping functionality of the MI/DI portal.

- Building prototype MI/DI reports. In order to get feedback on the report that the MI/DI portal will produce, we created customized, prototype Information Security MI/DI reports for EDUCAUSE board members using their live CDS 2014 data. This was such a useful exercise that we have decided to produce customized reports for each ITABAB member as well.

- Tracking 2014 expenses and budgeting for 2015. At the end of 2014, it was clear that we would need to shift some of our originally allocated budget line-items around to accommodate for more staff time and less consultant time spent on the grant. In January, we worked to understand what was officially spent through the end of 2014 and planned for our spending in 2015. We plan to prepare a budget revision request for the Lumina Foundation.

- Arranging an in-person meeting with the ITABAB. As an additional opportunity for feedback and input, we are planning to meet in-person with the members of the ITABAB in April.

- Exploring sustainability. To align these services with the strong ECAR brand, we discussed a sustainability model which will tie this service to the ECAR premium-level subscription.

**Project Status:** On track

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

**Priorities for February 2015:**

- Continue development work with Pinnacle Solutions, including review and approval of portal wire-frames.
- Create customized MI/DI reports for ITABAB members.
- Plan for additional deployment index content needed for CDS 2015.
- Finalize budget revision request due to Lumina.
- Explore revenue projections for an ECAR-premium pricing model and cost projections through 2016.