Lumina Grant Progress Report for March/April 2015

SITAR (Strategic IT Assessment Report)
Work in March and April 2015 focused on developing and testing a visual prototype of the assessment portal and meeting with the ITABAB to gather feedback about MI/DI reports and service design. Activities included:

- Portal development. In March EDUCAUSE and Pinnacle Solutions finalized portal wireframes and began developing a visual prototype of the portal. The portal is designed around three basic actions: creating an MI/DI report, adding and updating index responses, and creating peer groups (see Figure 1). The portal prototype was tested with 16 users at the EDUCAUSE Connect San Antonio event in April. Users were pleased with the ease of use of the system and had minor suggestions for improvement. Pinnacle Solutions will incorporate feedback from these tests as the portal is finalized in May.

- ITABAB face-to-face meeting. In early April the IT Assessment and Benchmarking Advisory Board (ITABAB) met for a face-to-face meeting in Louisville, CO. The purpose of this meeting was to provide feedback on the MI/DI prototype reports and to discuss service design plans.

**MI/DI Report Feedback**
The ITABAB felt that the MI/DI report has the proper contents; however, they had suggestions on reorganizing the report to be more concise (e.g. putting some items in an appendix). They
also stressed the need to eventually make this report flexible to present different views of the data to different audiences, but they prefer to not overcomplicate the report at the onset.

_Service Design Feedback_
The ITABAB felt that EDUCAUSE has credibility and a network that competitors are lacking. This positions EDUCAUSE well to provide an assessment service. However, there was concern that incorporating this service into ECAR could result in lost subscriptions and miss the target audience (i.e. smaller institutions with limited budget for analytics services). We are now exploring alternative sustainability options, including aligning the service with existing EDUCAUSE program areas.

Ultimately, the ITABAB believes that a marketable service should include the following:
- The ability to benchmark maturity and deployment,
- Connection with a network of experts or peers,
- Consistent engagement with experts or peer network (e.g. monthly calls),
- Coaching and monitoring of progress on goals.

_Project Status:_ On track

_Risks, Issues, or Concerns:_ None

_Priorities for May 2015:_
- Pinnacle Solutions will continue work on the portal, including programing the functionality needed to automatically generate the Information Security Maturity and Deployment Index report.
- EDUCAUSE will explore the idea of aligning the assessment service with EDUCAUSE program areas and estimate ongoing costs associated with this service design model.
- To facilitate discussions about aligning the assessment service with EDUCAUSE program areas, we will create a prototype MI/DI report for Student Success Technologies using the format developed for the Information Security report.
- In preparation for CDS 2015 and the launch of our service in 2016, we will develop analytics and research computing deployment indices to be included in CDS 2015 survey.