Lumina Grant Progress Report for July/August 2015

SITAR (Strategic IT Assessment Report)

Work in July and August 2015 focused on continuing development of the reporting portal and exploring alignment of the assessment service with EDUCAUSE program areas. Activities included:

- **Portal development:** Pinnacle Solutions has continued to work on the reporting portal, including programming a template for the semi-customized automated report. The initial approach used to create these templates was found to be infeasible at the end of July and a new solution was proposed and implemented. The delay caused by this change in approach led us to move our user pilot into September.

- **EDUCAUSE continued to explore the idea of aligning the assessment service with EDUCAUSE program areas.** We met with the leaders of the Higher Education Information Security Council (HEISC), the Enterprise IT program, and the Breakthrough Models Incubator program to demonstrate the portal and determine interest in including this service into their 2016 programming. The concept was well received and each group plans to consider how best to use the portal for their 2016 programming.

- To increase exposure to the new portal in 2016 and to further test concepts for additional programming, we have submitted several session proposals for the EDUCAUSE Learning Initiative (ELI) winter conference, both spring EDUCAUSE Connect events, and the Leading Change Institute summer program. Sessions are structured so that attendees will have the opportunity to create a benchmarking report and discuss results in a room of peers and experts.

- As an additional funding opportunity and to enhance the content of the MI/DI reports, EDUCAUSE has also explored the idea of corporate sponsorship for the new service. Initial ideas include: report branding, corporate collaboration on report content for certain sections of the report, development of white papers which could be referenced from the report, and interactive presentations in which corporate representatives provide a best practices view into report results. These ideas were presented to our IT Assessment and Benchmarking Advisory Board (ITABAB). Our advisors were receptive to the idea, however they were concerned that a corporate voice from one sponsor alone would be biased. They expressed a preference for collaborative input from multiple corporate stakeholders.

- In preparation for the 2016 portal launch, we discussed messaging strategies and announcement opportunities. We plan to announce the launch of this service at the EDUCAUSE Annual Conference in October 2015. The initial service will be fully available to ECAR premium subscribers and a quarterly release of one topic per quarter will be available to ECAR regular subscribers. Other opportunities to use the portal will be available on an à la carte basis and depending on our development of supporting services. At the EDUCAUSE Annual Conference we will provide demonstrations of the portal as well as introduce the new service in several presentations:
  - **Using Analytics, Business Intelligence, and Data Management to Advance Institutional Planning** (separate registration required) (Online; Tuesday, 10/27/15 11am-2PM)
  - **Moving the Red Queen Forward: Maturing Business Analytics Practices** (Thursday 10/29/15 1:30PM-2:20PM)
  - **Moving the Red Queen Forward: Learning Analytics Practices** (Thursday 10/29/15
2:40PM-3:30PM)
○ How to Use the EDUCAUSE CDS to Support Student Success (Friday, 10/30/15 8am-8:50AM)
● Through July and August we also spent time preparing financial and narrative summaries of the work completed from October 1, 2014 through July 31, 2015 in fulfillment of the Lumina grant requirements.

Project Status: On track

Risks, Issues, or Concerns: None

Priorities for September 2015:

● Pinnacle Solutions will continue work on the portal in preparation for user piloting in September.
● EDUCAUSE will prepare marketing and support materials needed for user piloting in September.
● EDUCAUSE will continue discussions with program area community leaders to evaluate the concept of integrating the assessment portal service into their program.
● EDUCAUSE will plan for communications and announcements about the new service at the EDUCAUSE Annual Conference in October 2015.

Lumina Grant Progress Report for September/October 2015

SITAR (Strategic IT Assessment Report)
Work in September through October 2015 focused on continuing development of the reporting portal and reports and planning the initial release of the assessment service. Activities included:

● Portal development: Pinnacle Solutions has continued to work on the reporting portal, including programming a template for the semi-customized automated report. The initial approach used to create these templates was found to be infeasible at the end of July and a new solution was proposed and implemented. The delay caused by this change in approach led us to move our user pilot into September.
● Service planning: We have decided to release the assessment service in early 2016 as a beta to better manage member expectations and to help us pilot and better understand needs for supporting services. Our user pilot and advisory group feedback have indicated that members want supporting services to accompany the service. Those services would help prepare them to contribute data and to use the reports to take actions. This is a need EDUCAUSE is encountering in other areas, and we want to better understand the specific services members need that we can deliver, as well as determine how best to deliver those services.
● The beta release will be deployed through several existing EDUCAUSE programs: ECAR (EDUCAUSE Center for Analysis and Research), ELI (EDUCAUSE Learning Initiative), the Cybersecurity Initiative, the Breakthrough Models Incubator program, and the Enterprise IT program. Each program will provide access to the reports relevant to their communities and deliver programming and support through their existing channels (such as meetings and workshops, webinars, web site resources, and so forth). Each program is creating specific plans for their parts of the beta.
● In the meantime, EDUCAUSE will be conducting planning for the association at large on related support services.
To further increase awareness of and exposure to the new portal and reports in 2016, they will be featured in the EDUCAUSE Learning Initiative (ELI) winter conference, both spring EDUCAUSE Connect events, and the Leading Change Institute summer program. Sessions are structured to give attendees the opportunity to create a benchmarking report and discuss results in a room of peers and experts.

In preparation for the 2016 beta launch, we are developing messaging strategies and announcement opportunities. We announced the service at the EDUCAUSE Annual Conference in October 2015. We demonstrated the portal and tool at three well-attended sessions and introduced the new service in several presentations:

- Using Analytics, Business Intelligence, and Data Management to Advance Institutional Planning (separate registration required) (Online; Tuesday, 10/27/15 11am-2PM)
- Moving the Red Queen Forward: Maturing Business Analytics Practices (Thursday 10/29/15 1:30PM-2:20PM)
- Moving the Red Queen Forward: Learning Analytics Practices (Thursday 10/29/15 2:40PM-3:30PM)
- How to Use the EDUCAUSE CDS to Support Student Success (Friday, 10/30/15 8am-8:50AM)

As an additional funding opportunity and to enhance the content of the MI/DI reports, EDUCAUSE has also explored the idea of corporate sponsorship for the new service. Initial ideas include: report branding, development of white papers which could be referenced from the report, and interactive presentations in which corporate representatives provide a best practices view into report results. These ideas were presented to our IT Assessment and Benchmarking Advisory Board (ITABAB). Our advisors were receptive to the idea, however they were concerned that a corporate voice from one sponsor alone would be biased. They expressed a preference for collaborative input from multiple corporate stakeholders.

We updated our development roadmap for the service and our related data infrastructure. The EDUCAUSE board approved funds to continue development in 2016 for several related projects:

- Enhancements and bug fixes of the beta release.
- Replacement of the current Core Data Service reporting tool, to develop a more contemporary interface and functionality.
- Usability and functionality improvements to the ECAR student and faculty research projects to encourage more participation.

Project Status: On track

Risks, Issues, or Concerns: None

Priorities for November-December 2015:

- Pinnacle Solutions will complete work on the portal and reports in preparation for the early 2016 beta release of the assessment service.
- EDUCAUSE programs will complete planning for integrating the assessment service into their programs as part of the 2016 beta release and for evaluating the beta.
- EDUCAUSE will prepare marketing and support materials for the beta release.