Lumina Grant Progress Report for November/December 2015

SITAR (Strategic IT Assessment Report)

Work in November and December 2015 focused on preparing for the launch of the service as a beta in January 2016. Activities included:

- Portal development: Pinnacle Solutions has continued to work on the reporting portal, including working with EDUCAUSE staff to put a secure data transfer in place and to connect with our single sign-on system. The templates for the first two topics (information security and student success) were finalized and tested.
- Continued design of the web site for the service: educause.edu/benchmarking
- Finalized parameters of the beta and documented the work in a project charter. The beta will assess both the portal and reports themselves as well as community needs for support providing data, interpreting the reports, and developing action plans based on the results. The charter documents:
  - Beta objectives and deliverables
  - The maturity and deployment indices that will be released
  - Which members of the EDUCAUSE community will receive access to the beta
  - A general outline of our plan for testing
  - The need for supporting services - Roles, responsibilities, and timeline
  - Project structure and governance
- Hired and onboarded a senior analyst to support the new benchmarking service. Catherine Watt has a Ph.D. in higher education policy from the University of Maryland College Park. She has extensive experience in higher education, serving as the Director of Distance Learning at Purdue and in multiple roles at Clemson University, including the Director of Institutional Research. She joined the staff in mid-November.
- Continued planning and design for the service assessment portion of the beta release, which will involve several EDUCAUSE programs, including ECAR (the EDUCAUSE Center for Analysis and Research), ELI (the EDUCAUSE Learning Initiative), the Information Security program, the Enterprise IT Program, and a new program call Leading Academic Transformation. Each program supports a different subset of our community in a different way. Releasing the beta to multiple programs will provide a diverse laboratory in which to explore the usefulness of the reports, the functionality of the portal, and an array of potential supporting services and needs. The first tests of supporting service needs will occur in January, when the service’s availability is announced to ECAR members and February, when the student success and culture of innovation reports are featured in workshops at the ELI annual conference.
- Initiated a series of promotions of the service and the beta, which will gain momentum in early 2016. It will include
  - numerous references in the EDUCAUSE Top 10 Issues article (published in January), which is habitually the most highly read article in EDUCAUSE Review.
  - ongoing references to the service by EDUCAUSE’s President and CEO John O’Brien in articles, blogs, and presentations.
  - integration of the service in content at the ELI, Information Security Professionals, Enterprise IT Summit, and both Connect conferences. Collectively, these events are attended by a total of 1,500-2,000 individuals.
- Webinars for ECAR subscribers to review, discuss, and apply the tools.
- A workshop at the AGB conference run by John O’Brien and John Dunning (CIO, Wayne State College)
- A pilot forum in December 2016 in collaboration with ACE and NACUBO, to convene CAOs, CBOs, and CIOs. The service will be a centerpiece of the forum, which is tentatively titled, “Using Data to Inform Strategic Planning.” We are seeking a funder for the forum to help off-set the costs.

**Project Status:** On track

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

**Priorities for January and February 2016:**

- Finalization of the portal and reports for release
- Launch of the beta, January
- Troubleshooting and support of the beta
- Ongoing project management
- Promotion of the beta and of EDUCAUSE maturity indices
- Use of the reports during sessions at the ELI conference
- Communications and promotions of the service