

Senate Committee on Information Technologies (SCIT)
February 7, 2017
Minutes of the Meeting

These minutes reflect discussion and debate at a meeting of a committee of the University of Minnesota Senate; none of the comments, conclusions, or actions reported in these minutes represents the views of, nor are they binding on, the senate, the administration, or the Board of Regents.

[In these minutes: Collaborative Tools; Constituent Relationship Management]

PRESENT: Geoffrey Ghose (chair), William Dana, Santiago Fernandez-Gimenez, Kate McCready, Carlos Soria, Timothy Nichols, Al Beitz, John Butler, Bernie Gulachek, Robert Rubinyi, Nancy Carpenter, Michelle Driessen, Charles Miller, Karen Monsen, Yoichi Watanabe

REGRETS: Diane Willow

ABSENT: Kristin Janke, Madeline Doak, Brandon Vanderbush, Rajkumar Vyas

GUESTS: Kate McCready, director of content services, University Libraries; Ben Wiggins, program director, Digital Arts, Sciences, and Humanities; Megan Kocher, science librarian, Food Sciences and Nutrition, Animal Science, and Soil, Water, and Climate; Bernie Gulachek, interim vice president and chief information officer, Office of Information Technology (OIT); Renee Fawcett, Enterprise Constituent Relationship Management (ECRM) service owner, OIT; Grant Clavelle, information technology director, Academic Support Resources

OTHERS: Linc Kallsen, University Finance

Chair Geoffrey Ghose welcomed the committee and the members introduced themselves.

1. Collaborative tools - Kate McCready, director of content services, University Libraries, began by noting that while there is no one department currently assigned to collaborative tools, University Libraries often works in this area and collaborates with other offices to assist faculty, staff and students in using and accessing these tools. She added that there is currently no central place to find a list of these available tools.

Project management tools are often used for collaboration, capturing decisions, tracking work, breaking down work, assigning tasks, and tracking project status. There is not one tool that the University uses for this purpose, but many, for example Asana, Trello, other commercial programs and options, said McCready. Currently, approximately 50% of University Libraries projects utilize Asana project management software. The program can be used to email work assignments and track projects, and is free for groups of up to 15. Trello is typically used in the libraries for data and technology projects, and has a free version available. The Trello interface utilizes boards where tasks can be assigned to group members. Other commercial programs available include Jira (though McCready noted that this program was a bit more high level than anything that was needed for most projects), and is used in the Carlson School of Management.

Ben Wiggins, program director, Digital Arts, Sciences, and Humanities (DASH), noted that there are project management templates in Google Sites that integrate with Google Docs, Google Calendar, and Google Sheets, and these can be used for teaching and research (i.e. collaborative class notes, plugins for Google Sheets, real-time collaboration on group work, etc.). Collaborative communications are also available in Google, as Google Hangouts can be integrated with Google calendar and used for videoconferencing and even broadcasting, said Wiggins. Drive is an excellent collaborative storage option, he added, with no limit on data size. Box is an option for collaborative storage for teams requiring Health Insurance Portability and Accountability Act (HIPAA) compliance. Disciplinary-specific collaboration tools are also available, he noted, including tools to help with surveys and teaching support, and IT liaisons are available for all departments to help identify the best tools.

Megan Kocher, science librarian, Food Sciences and Nutrition, Animal Science, and Soil, Water, and Climate, said that Authorea is available for faculty and graduate students to collaboratively write, cite, host data, and publish all in one platform. This program was developed by CERN and is widely used by astrophysicists, but is becoming more user-friendly for other disciplines by offering rich text editing as well as LaTeX. This program can be exported to many different publisher templates, and features one-click citation. There is a free basic plan, which includes publication of one article, and \$10-\$25 per month for more, said Kocher. Overleaf, another collaborative writing and publication tool, also offers rich text editing in addition to LaTeX, and export is available to many different publisher templates, she added.

Kocher provided an overview of three citation manager tools, EndNote, Mendeley, and Zotero. In EndNote, users can share a library with up to 100 other users. Mendeley offers unlimited sharing of citations, but allows very little sharing of PDF documents, and has unreasonable pricing for more sharing. In Zotero, group sharing is limited only by storage space, with reasonable rates for additional storage.

A list of companies providing electronic lab notebooks is maintained by University Libraries, Kocher said, and available at: <https://www.lib.umn.edu/datamanagement/eln>. This site includes product comparisons. Kocher noted that currently, University Libraries is consulting with individual lab groups to identify the best tools for their work, and no one tool seems to fit everyone's needs. In reviewing what is happening at the top 30 research institutions, there does not seem to be much activity with electronic lab notebooks, she added; some support products are offered by libraries or IT departments, and some individual departments and labs have purchased products directly. The most commonly supported product is LabArchives.

McCready provided the following University resources to the committee:

- Getting Started with the Project Toolkit from OIT - <https://it.umn.edu/community/resources-it-staff/project-toolkit/getting-started>
- Project management methodology document (created by OIT) - (<https://it.umn.edu/sites/it.umn.edu/files/University%20of%20Minnesota%20Project%20Management%20Methodology%20V4.pdf>) This resource details the procedures and approach to be used when managing an information technology project, and can help

- guide new and experienced project managers through the project management lifecycle.
- Project Collaborators and Change Management - <http://pcmc.umn.edu> - Project and Change Management Collaborators (PCMC) is a vibrant and responsive peer network at the University of Minnesota. They strive to advance knowledge and foster exceptional results in project and change management.

Carlos Soria asked what the difference was between the Google tools that are available to researchers here at the University and electronic lab notebooks. Kocher replied that some researchers handle sensitive data, and electronic lab notebooks are more appropriate. Also, researchers may have better control over who can add what type of information to the lab data, said Kocher.

Al Beitz asked if most data was stored in the cloud, since many labs need to be able to store large amounts of data. Kocher responded that for electronic lab notebooks, the charge is based on the amount of data storage needed; in Google, however, there is no cap on storage.

Nancy Carpenter asked how system campuses could gain access to these tools. McCready replied that the commercial tools that were reviewed today are available to everyone, so there is not an issue with system campus access.

Bob Rubinyi asked how citation managers were coordinated between University Libraries and the Office of Information Technology (OIT). John Butler responded that citation managers were first licensed at the campus level in 2003, and that University Libraries is constantly seeking options for economies of scale. Cost models are constantly shifting, he added, for example with plagiarism tools, and it is not always cost effective for the University to license these tools in bulk.

Beitz asked if statistical tools, for example Prism, are available for faculty. Butler replied that Prism is available on public University computers. Bernie Gulachek, interim vice president and chief information officer, OIT, added that there is a software licensing and purchasing group in OIT in place to explore software apps, price points, etc. This group looks to the functional or business purpose for licensing, with an eye to volume and price point. A catalog of available apps is listed on it.umn.edu. Smaller applications may be licensed by individual departments, said Gulachek. Butler noted that ART GIS is an example of an application that had high demand, so the University licensed it in bulk.

Ghose asked what the University Libraries' role was in this arena; evaluation, education on the existing resources, or something else? McCready replied that University Libraries was supportive of the entire life cycle of research, and liaisons are available to all departments. These liaisons know what tools are currently available, and which are being tested. University Libraries will also work with OIT and others as needed. Wiggins added that one goal of DASH is to help expand the faculty view of how to use University Libraries; they act as one entry point, and can connect to others as the project requires, with a lot of work in data storage.

Michelle Driessen said that her labs are now completely paper-free, and she enjoys utilizing

electronic lab notebooks for her courses, which provide instant updates and allow her to push work directly to students. The program she uses is licensed per student at \$20, which is billed directly to the student in place of a textbook.

2. Constituent relationship management - Gulachek provided an overview of constituent relationship management at the University, noting that in 2009, the University began looking for ways to get a 360 degree view of relationships, from application through graduation, donation, and beyond. This was done in an effort to enhance student success, offer needed support, and simplify the system used for all five campuses for recruitment and admissions.

Grant Clavelle, information technology director, Academic Support Resources (ASR), said that Salesforce was acquired in 2011 after a competitive bid process with other cloud-based businesses offering constituent relationship management tools (CRM). An executive steering committee was created to help guide this initiative, which included the chief information officer, two vice provosts, and the admissions director, among others. An interest in using Salesforce was exhibited by more than 50 groups. Salesforce is now owned by Institutional Reporting, said Clavelle. To evaluate the potential return on investment for Salesforce, several factors were analyzed, including its potential to increase student graduation rates, produce higher student engagement rates, provide improvements on business processes, and improve the campus climate. The University CRM Enterprise vision is to develop and foster life-long meaningful relationships between the University and its constituents through personalized service that drives discovery and illuminates the University mission, with the goals of improving constituent satisfaction, realizing operational efficiencies, creating new revenue opportunities, and improving retention and graduation rates, said Clavelle.

Salesforce was adopted for use by the Twin Cities Office for Undergraduate Admissions in 2011, and on the system campuses in 2012. One Stop Student Services began using the system in 2013, Housing and Residential Life in 2014, and finally, the College of Continuing Education, the Office of Student Finance, Student Degree Progress, and the College of Pharmacy from 2015-2016. There are currently 950 Salesforce users, and 600 Marketing Cloud users (a mass email tool that helps to create more personalized interactions). Salesforce assists University departments in managing recruitment relationships, student relationships, and external relationships (including tracking relationships with outside organizations), said Clavelle.

Renee Fawcett, Enterprise Constituent Relationship Management (ECRM) service owner, OIT, provided an example of increased efficiency, cost savings, revenue increase and enhanced service in the Office of Admissions. Through using Salesforce, the office was able to increase prospect calls from 60 to 350 calls per night, and thereby reduce staff to two work study students. This resulted in \$17,000 cost savings per year. In the area of corporate relationship management, Salesforce helps administrators make data driven decisions, said Clavelle, by tracking awards, membership, and volunteering to identify additional opportunities to financially engage constituents.

Fawcett said that in 2017 the University will seek to add additional integrations, data, communication and marketing automation, subscriber management, and will create a

multi-organization strategy in consultation with governance groups. In 2018, the goal will be to have more useful strategic data, a “plug in and play” architecture, and to roll out new technical features in Salesforce.

Clavelle provided an overview of the purpose of the Center of Excellence (CoE), an entity and strategy to increase the University’s return on investment. The purpose of the group is to:

- Optimize the value and ROI of the Salesforce investment;
- Ensure data integrity and use of best practice;
- Promote dynamic usage while respecting Enterprise rules;
- Architect the system which enables a 360 degree view;
- Lead the University to national distinction in Higher Education use of CRM.

In collaboration with University Finance, Clavelle said, this group has the following goals and primary responsibilities:

- Governance: prioritization of CRM roadmap; monitor adherence to rules; align Salesforce to achieve University goals/metrics.
- Process: Promote common processes and share Salesforce solutions for common use cases, business requirements.
- Collaboration: Provide forum to encourage cooperation, resolve conflicts, exchange ideas, share best practice, act as clearinghouse.
- Evangelism: Communicate, market, encourage adoption, advocate on behalf of and to users across the University.

While today there are many disparate systems in use, said Clavelle, the goal is to align these systems and associated data, assemble that data, and utilize the data to provide the 360 degree view of constituents in Salesforce. There is still work to do, he noted, to use this data to advance the University mission and the president’s initiatives. Next steps include implementation of the CoE, greater executive sponsorship, analytics, governance, continuing work toward the 360 degree view, integrations, creation of a Master Data Management hub, and setting greater goals surrounding retention and graduation.

Driessen asked if the 360 degree view would include course management data. Gulachek responded that analytics will lay the foundation for how the University can be competitive in future admissions. The most useful types of data will be explored. For students, it will be important to know what kinds of activities and behaviors make them more or less successful, he added.

Beitz asked how this data was stored, and if it was possible to use de-identified data to help with the issue of student mental health concerns. Fawcett replied that all student data obtained is saved as a contact; data can be pulled and student names removed if needed. Linc Kallsen, director of institutional analysis, University Finance, said that there could be a lot of types of data that would point to a potential mental health concern; for example, if a student had been frequently scanning in at the Recreation and Wellness Center, and stopped going, there would be a record.

Santiago Fernandez-Gimenez asked what would be used as a consistent identifying factor, and

what data would be important to have. While there is the potential for a large amount of data collection, he added, it is always a factor in these discussions to figure out where the important data points are. Butler responded that this is still being discussed, and that there is a risk of lack of private data control in the units.

Gulachek let the committee know that Unizin would be discussed at the March SCIT meeting, and that data was beginning to circulate at the institution regarding the Canvas pilot. OIT will be consulting with SCIT regarding planning for the “next generation digital learning environment” at the University.

Hearing no further business, the meeting was adjourned.

Barbara Irish
University Senate Office