EDUCAUSE Peer Review Service: Working Group Recommendations

PRESENTED BY:
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#EDU17
Today’s Agenda

- Working Group Background
- Process
- Service Components
  - Components
  - Pilot Recommendations
  - Questions for you
- Discussion

Add your notes, questions, and comments: https://goo.gl/PcHrKD
Today’s Goals

- Feedback on components and pilot recommendations
- Would this be a useful service?
- Are there any gaps in our thinking?
Working Group Background

• Began as a CIO Constituent Group discussion (June 2017)

• Formed a working group to discuss what such a service might look like and make recommendations to EDUCAUSE

• Group formed in August 2017; meets biweekly

• Initial sharing at this meeting; will make changes based on feedback prior to final recommendations
Working Group Members

- Kitty Bridges, Associate Vice President, Service, Security & Compliance, New York University
- Chris Davis, Vice President for Information Systems & Technology, University of Central Arkansas
- Cory Falldine, Chief Information Officer, Associate Vice President, Information Technology, Emporia State University
- Peter Greco, CTO, Saint Mary's College of California
- Mara Hancock, CIO, VP-Technology, California College of the Arts
- Bret Ingerman, Vice President for Information Technology, Tallahassee Community College
- Joanne Kossuth, CIO, Mitchell College
- Jane Livingston, Associate CIO, Yale University
- Lori MacMullen, Executive Director, CUCCIO
- Marty Ringle, CIO, Reed College
- Mike Russell, AVC, Enterprise Services Operations, Virginia CC System
- Celeste Schwartz, Vice President for Information Technology, Montgomery County Community College
- David Seidl, Senior Director of Campus Technology Services, University of Notre Dame
- Ralph Zottola, CTO, Research Computing, University of Massachusetts, Central Office
EDUCAUSE Staff

- Ana Borry, Director of iPASS Implementation Services
- Susan Grajek, Vice President, Communities and Research
- Joanna Grama, Director of Cybersecurity and IT GRC Programs
- Leah Lang, Director of Analytics Services
- Susan Nesbitt, Program Manager
- Betsy Reinitz, Director of Enterprise IT Programs
- Karen Wetzel, Senior Manager, ECAR Working Groups
Process

- CIO CG meeting: Present basic service idea, get feedback, and check in on expectations
- Make changes based on community discussions before making recommendation to EDUCAUSE leadership
- Preliminary advisory committee to work out details, e.g.,:
  - Validate service
  - Business/service models
  - Financial models (e.g., built into membership fees, stand-alone, hybrid)
  - Standard review processes
  - Pilot details: who will participate, feedback, etc.
- Pilot: Minimal start-up costs, test feasibility
Service Components

- Component 1: Pre-Assessment Toolkit
- Component 2: Reviewer Guidelines and Support
- Component 3: EDUCAUSE Profile
- Component 4: Concierge Service
Component 1: Pre-Assessment Toolkit

- Follows stand-alone self-assessment
- Helps identify specific needs and relevant information
- Includes:
  - **Pre-Assessment Data Report**: Pre-populates from existing EDUCAUSE data
  - **Advance Checklist**: Items a reviewer would want to have before a site visit (e.g., strategic plan, budget, etc.)
  - **Topic-Specific Templates**: For common use cases/scenarios/areas for assessment (e.g., current state analysis, staffing, etc.)
Component 1: Pilot Recommendations

- Use CDS IT domain areas as the basis for categorization
- Incorporate additional areas, e.g., service/change management, communication, leadership at later stages

CDS IT Domain Areas:
- Administration and Management of IT
- IT Support Services
- Educational Technology Services
- Research Computing Services
- Communications Infrastructure Services
- Enterprise Infrastructure and Services
- Information Security
- Information Systems and Applications
Component 1: Questions

1. Is this component something your institution would find valuable and use?
2. What are we missing?

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Component 2: Reviewer Guidelines and Support

Reviewer Guidelines
- Active EDUCAUSE membership
- Teams led by CIOs and senior IT leaders
- Teams have professional development component built in (including mentoring)
- No additional minimum qualifications

Reviewer Training & Development
- EDUCAUSE workshops and seminars for reviewers and reviewees
- Mentoring components
Component 2: Pilot Recommendations

- Focus on CIOs as reviewers, but allow for individual and team reviews
- Start with specific work areas, e.g., current state analysis, strategic directions, etc.
- Do not develop reviewer certification, but incorporate training badges
- Include mentoring as a focus of the second phase of the pilot (not initial)
Component 2: Questions

1. Are we on the right track with the proposed reviewer guidelines?
2. How do we identify reviewer training/skill needs and gaps?
3. What are we missing?

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Component 3: EDUCAUSE Profile & Peer Review Fields

Leverage the existing profile to:

▪ Extend the use of the profile, for this service and for finding presenters, identifying mentors, recruiting, etc.
▪ Build awareness of this service when a profile is created
▪ Provide a way to register the team/reviewer when they've done a review

Sample use cases:

▪ Institutions find a lead reviewer, who then uses the same database to find members of a review team
▪ Institutions use the tool to build their own team of reviewers
▪ Institutions find an individual reviewer only (no team)
Component 3: Pilot Recommendations (1 of 2)

- Make only a limited amount of data public, requiring login to access more detailed information
- Require reviewed institutions to add contact information to reviewer profiles (so other schools can reach out to them)
- Do not otherwise formalize assessment (e.g., ratings, reviews, etc.)
- Search capabilities:
  - Allow searching across each fields
  - Allow prioritization/weighting of fields
  - Ability to drill down into search results
Recommended Fields

- Are you a peer reviewer? (y/n/retired/interested)
- Have been a lead reviewer or on a review team
- Years of experience
- Types of institutions reviewed
- Types of institutions where have work experience
- Number of past reviews
- Training taken/badges received
- Specialty areas (ITSM, security, budgeting, strategic planning, etc.)
- Relevant certifications
- Current reviewer resume
- Types of consulting (e.g., review of a specific service, of the entire IT department, etc.)
Component 3: Questions

1. What are your thoughts on leveraging the existing EDUCAUSE profiles?

2. What are we missing?

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Component 4: Concierge Service

- Why a concierge service? For institutions that:
  - Need help understanding if a review will meet their needs
  - Want assistance identifying a reviewer or review team. Some use cases:
    - Presidents or other not-IT leaders requesting the review
    - CIOs or similar who don’t want to be seen as self-selecting reviewers

- To be provided under the auspices of a peer review advisory committee—staffed by EDUCAUSE, but composed by members
Component 4: Pilot Recommendations

- This component is dependent on earlier components (particularly the profile)
- The advisory committee should determine how this component be piloted
Component 4: Questions

1. What would you want to be included in a concierge service?

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How to Find Out More

• Community Central: Collaborate
  • Wednesday, November 1, 11:40 a.m. - 12:30 p.m.
  • Thursday, November 2, 4:30 - 5:20 p.m.

• Upcoming webinar

• CIO Constituent Group
  – CIO@listserv.educause.edu
  – www.educause.edu/discuss

• Contact us: peer-review@educause.edu

• Expressions of interest:
  https://goo.gl/forms/RAZEE50Dn7ze3ti2