<table>
<thead>
<tr>
<th>Topic</th>
<th>Time</th>
<th>Speaker(s)</th>
</tr>
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<tbody>
<tr>
<td>Introductions / Agenda Review</td>
<td>3 min</td>
<td>Chris and Ron</td>
</tr>
<tr>
<td>CIO 2016 Overview</td>
<td>15 min</td>
<td>Larry Levine</td>
</tr>
<tr>
<td>Planning, Budget, and Analysis (PBA) Office Overview</td>
<td>30 min</td>
<td>Steve Vassallo</td>
</tr>
<tr>
<td>OIT Operations update</td>
<td>20 min</td>
<td>David Hamrick</td>
</tr>
<tr>
<td>ECRM Update</td>
<td>20 min</td>
<td>Nalini</td>
</tr>
<tr>
<td>IT Changes Planned for Summer 2016 (time permitting)</td>
<td>5 min</td>
<td>Brent Phillips</td>
</tr>
<tr>
<td>Decision &amp; Action Item Review</td>
<td>2 min</td>
<td>Emilia Noullet</td>
</tr>
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CU Boulder IT Directions

- Meta "culture" goal
- The three R's

- Student Success
  - CRM COE
  - Student Experience
  - Analytics (Steve Vassallo)
  - BBA and CE – distance, MOOCs, on-line, CU Connect

- ERP
- RC
  - Summit
  - Data Centers
  - HPC masters. Security and Accessibility masters?

- DDS
- Space
- Second three year strategic plan
Overview of the Office of Data Analytics

May 5th, 2016
Steve Vassallo – Assistant Vice Chancellor
Toward data-driven decisions for everyone
A new organization

Office of Data Analytics

Institutional Research

Reporting and Analytics
Responsibilities include:

- Create a comprehensive and effective data architecture.
- Design and deploy reporting and analytics solutions.
- Employ advanced quantitative methods, including data mining techniques, to create predictive and other types of analyses.
Create a comprehensive and effective data architecture

more data on campus……
Create a comprehensive and effective data architecture

Building an analytics infrastructure is key to meeting campus reporting and analytics needs.
Create a comprehensive and effective data architecture

• MongoDB as an analytics hub solution
  ➢ MongoDB is an open-source, NoSQL, Schema-less, document-oriented database technology.
  ➢ Flexible and easy to incorporate new data sources.
  ➢ Allows for integrating both structured and unstructured data.
  ➢ Enables faster access of data.
  ➢ Data is stored in the form of JSON style documents.
    • example: “student” document.
Design and deploy reporting and analytics solutions

Analytics Hub

Reports and Dashboards  Predictive Analytics  Operationalizing Insights
Dashboard example

Academic, Support Facilities
Space Inventory By Classification for Campus

CU-Boulder Space Inventory Overview
Sept 2015

180,872 Sq. Ft.
Study Facilities

NORLIN LIBRARY
Opportunities abound

• Help advance the campus culture toward a data-driven approach to decision making
  - Provide faculty, students, and staff with representation to help guide our efforts.
  - Focus on design and positive user experience.

• Data governance
  - Work with CU Office of Information Security and campus data stewards to strengthen our processes.

• Technical innovations
  - Partner with Office of Information Technology, Office of Performance Improvement, and others around campus.
  - Engage faculty and students.
OIT
Operations Update

David Hamrick
David.Hamrick@colorado.edu
Agenda

• VoIP
• Data center
• Learning Spaces
• Networking
• Systems
• Other
VoIP

• 1000+ phones already converted
• Remainder of campus (7K) – starts this month & will go through Oct
• Soft phones – looking to avoid purchasing all phones (Jabber)
• Next steps - UC, Call Centers
Data Center

• SPSC – Phase 2
  – Space – 80% Reserved
    • Includes UIS, NSO, NSIDC
  – Project underway to complete buildout
    • Power, racks, containment (Oct 1)
    • Power outage needed to put in new transformer (Jun 2)

• Computing Center
  – ATS replacement (outage – Apr 3)

• HPCF
  – Preparing for Summit arrival
Learning Spaces

- **VDI**
  - 13 labs – 267 zero clients (35% of Windows footprint)
  - 300 virtual desktops – BYOD
    - 1962 unique users, 10,700 logins

- **BBA**
  - CAETE studios – OIT
    - 3 traditional studios in Eng basement (tech refresh this summer)
    - Standardization of legacy CAETE rooms (Echo-> Mediasite)
  - 5 rooms added Fall/Winter 2015 (HUMN, DUANE, EDUC, SEEC, CIVIL)
    - 5 more to be built this summer (ECCR)
  - MOOCS
    - New production studio under development in Stadium 350

- **CU South**
- **Legacy services**
  - Lecture capture
  - Zoom
Zoom Minutes/Month

Meeting Minutes

Meeting Minutes

Linear (Meeting Minutes)
Mediasite Views/Month

<table>
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<th>Views</th>
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<td>May '15</td>
<td>271,425</td>
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<tr>
<td>June '15</td>
<td>283,986</td>
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<tr>
<td>July '15</td>
<td>285,057</td>
</tr>
<tr>
<td>Aug '15</td>
<td>287,488</td>
</tr>
<tr>
<td>Sept '15</td>
<td>289,697</td>
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<tr>
<td>Oct '15</td>
<td>301,501</td>
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<td>Nov '15</td>
<td>318,690</td>
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<tr>
<td>Dec '15</td>
<td>334,194</td>
</tr>
<tr>
<td>Jan '16</td>
<td>349,405</td>
</tr>
<tr>
<td>Feb '16</td>
<td>355,549</td>
</tr>
<tr>
<td>Mar '16</td>
<td>373,031</td>
</tr>
<tr>
<td>Apr '16</td>
<td>387,956</td>
</tr>
<tr>
<td>May '16</td>
<td>416,351</td>
</tr>
</tbody>
</table>
Networking

• WiFi
  – ResHalls
    • Arnet – pilot
  – Bringing design in house
  – Aruba – Wilderness Place
  – Porter – refresh completed

• Core/distribution
  – Distribution FW @ TLC replaced, RL1 up next
  – Border FWs upgraded
  – TTO & Wilderness connectivity
Systems (SIS)

• Private Cloud
  – Lower pricing
    • No charge for sys admin time for VM’s
    • Prices 10% - July 1

• Growth continues...
  – 470+ virtual, 343 physical servers

• Virtualization – internal audit
  – Focus on BC/DR
  – Cross campus focus on DR
    • Boulder -> Denver NC
    • UCCS -> Boulder
    • UIS -> Denver + Boulder
Other

- Space optimization
  - Archibus
- Educational Broadband Spectrum
  - Substantial use (Nov ‘16)
  - Auction (10/15 – unsuccessful)
    - Evaluating other options
CCITP Briefing

CRM Program Briefing

May 5, 2016
Topics

- Enterprise CRM Program Review
  - Status
  - Focus
  - New Projects
- Focus: Student Success 2.0
  - What is it?
  - What’s coming?
- Next Actions
**Major Accomplishments**

- Training 250+ eCommunicators and decommissioning existing systems (February 2016)
- CRM Ecosystem now includes Sales Cloud, Marketing Cloud, Cvent, Geopointe, Riva, WalkME
- 1.65M Constituent Records loaded in SFDC
- Total of 41,016 Advising Appts; 15,753 this academic year
- Early Point Release of CRM for first year academic advisors in October 2014 concentrating on “By 2020” graduates
- Release of CRM solution for Office of Industry Collaboration (OIC) November 2014 for tracking leads, opportunities, and contacts for public-facing office
- Advisors and undergraduate students throughout Boulder colleges and schools use MyCUHub, the Advising application (157 Advisors, 33,104 students)
- Addressed 3,864 requirements for Advising application
- Established CRM Program, Center of Excellence, CRM Executive Committee, CRM Advisory Group and CRM Tech Review Board
- CRM Center of Excellence Build – completion of best practices and processes for execution and planning of CRM projects (January 2016)

**Program Status:**
- **GREEN** – Funded, Staffed, On track

**Upcoming Milestones**

- Delivery of Student Success 2.0 (February – Sept 2016)
  - New Student Welcome & Family Programs – Feb & May ‘16
  - New Roster, Check In/Out, Tutoring – May ‘16
  - Athletics Advising & Tutoring – June ‘16
  - Engagement Scoring: Students & Alumni – summer ‘16
  - Student Affairs Groups, including Resident Advisors – summer ‘16
  - “Meta” Student Dashboard Design – Summer ‘16
- eComm preference changes: Student to Alum – May ‘16
- Transition to Enterprise Security Model
- Project Charter: Skaggs School of Pharmacy
- Project Charter: eComm Phase 3
- Project Charter: UCB CEAS Graduate Programs

**Program Risks**

- Dependencies on UIS MDM/Architecture team for data reconciliation & merging; and, IdM CoE and campus IdM teams for CU-wide “role manager” for enterprise applications
- Need for dedicated data management and integration staff within CoE, Advancement Ops and UIS
- Demand management – projects and enterprise platform

**Projects**

- **UCB Advising 1.75**
  - Prod: CRM Service
- **eComm 1.0**
  - Prod: CRM Service
- **eComm 2.0**
  - Prod: CRM Service
- **Enterprise Security Release**
  - Prod: Readiness
- **Center of Excellence Build**
  - Prod: CRM Service
- **UCB PHet**
  - Stage
- **UCB Student Success 2.0**
  - Dev: Sprint 3
CU Enterprise CRM
Comprehensive System of Engagement for our Constituents

Channels: Web, MyCUInfo, Email, SMS, Social, Phone, Mail, In-Person, Referrals

Recruitment
- Recruiter Territory Management, Visits and Fairs
- Lead Acquisition & Scoring
- Test Score Integration
- Application & Third-Party App Integration
- Admission
- Document Management
- Admission Decision Management
- Commitment / Deposit Management
- Orientation & Yield Activities

Student Success
- New Student Welcome
- Financial Aid
- Notifications/Appeals
- Advising
- Retention Actions
- Course Catalog & Registration Information
- One Stop Shop/Self-Service
- Enrollment Flags (FERPA, Holds, Drops, etc.)
- Early Assessment/Warning/Engagement Scoring
- Internship, Co-Op, Study Abroad, Career Services
- Athletics/Student Organizations

Advancement
- Capital Campaign Management
- Major Gift & Planned Giving
- Annual Fund/Faculty-Staff Campaign
- Corporate & Foundation Relations
- Prospect Wealth Profile
- Alumni and Advisory Boards
- Future Alumni Programming
- Reunions and Trips

Industry / Community Relations
- Opportunity Management
- Tech Transfer
- Joint Ventures
- STEM Programs Management
- Prospect Profile
- Industry & Community Boards
- Institutes Mgmt

Marketing
- Campaign Plan & Budget
- Marketing Automation
- Online Ad
- Social Listening/Interaction
- Content Mgmt
- Segmentation
- Predictive Analytics

Community Engagement
- Online Self-Service
- Student Service / Social Cust. Service
- Call Center
- Knowledge Base
- Calendar/Events Mgmt
- Volunteer/Mentor/Fan Mgmt
- Forms/Surveys

eComm Program
- Targeted Constituent Communications
- Email Marketing
- Event Registration
- Alumni Community

CU Enterprise CRM
Comprehensive System of Engagement for our Constituents
Enterprise CRM Software & Applications

Salesforce.com Platform, Sales & Service Cloud, Communities

CRM Architecture, Data Integrations w/ UIS & Advancement, CU-wide Enterprise CRM Services

Marketing Cloud
Apsona
Cvent
Knowledge
TextUs
Campaign Status
Plivo
Geopointe
SmartSheet
Advance
Campus Solutions: SIS, HRMS, etc.

Form Tools: Drupal Forms Connector, Formstack / Form Assembly

Gearset
Conga
TaskRay / MyDay
Cloudingo
Social Studio
Riva

As of March 3, 2016
Successful change requires both the technical and people sides

Project management and change management have a joint value proposition oriented toward business results.

Source: Prosci
Student Success Journey Map

Create student well-being across the various phases of the transformative process of education

**Student Experience**

**Excitement and Loss**

**Excitement, Fear & Anxiety of Becoming Someone New**

**Excitement and Nostalgia**

**Admission**

**Pre-Orientation**

- Currently no pre-orientation or academic orientation

**Orientation**

- 2-step orientation replaced with modular online orientation & 5-7 day move in

**First Year**

**First-Year Experience**

1. Faculty Mentor
2. Small Class

**Junior Year**

**Career Services**

1. Internships
2. Alumni Contacts
3. Resume Hosting

**Graduation**

**Alumni**

**Alumni communicate back to new students**

**Ongoing Student Progress**

1. Student Portfolio of Work
2. Student Dashboard for faculty, advising, student scheduling
3. Faculty engagement & report
4. Advising issues:
   - Probation (?)
   - Redirection Process

**Student Success Journey Map**

Create student well-being across the various phases of the transformative process of education

**Pre-Orientation**

1. Welcome Videos
2. Online Registration
3. Communication Arena
   - Meet ups
   - Video autobiographies
   - Alumni
   - Student groups

**Didactic and narrative Videos**

- For students and parents
- Advising
- Student Services
- Academics

**Welcome Week of Orientation**

1. Large Welcome
2. Small Groups
   - Discussion of a book
   - Outward bound Adventure
   - Community Service Project

**Faculty Experience**

1. Faculty Mentor
2. Small Class

**Alumni**

- Communicate back to new students
Student Success Objectives

Develop business processes and implement technologies that enable CU-Boulder to drive graduation rates to 80%+

- Connect more effectively with our students
- Learn what makes our students tick; what matters to them
- Identify at-risk students
- Align staff and faculty to assist students
- Make referrals and handoffs smoother
- Log and track what we do for students
- Log and track student activities
- Use the information to assist students and serve them in ways they request
- Make it EASY for students to navigate the “System”
- Build communities and foster sense of belonging
# Student Success Roadmap

Improve CU-Boulder student experience and optimize work processes

## 2.0 Release

**Student Success - UCB Undergrads**

- New Student Welcome
  - NSFP Workspace
  - New Student Logging
  - Interests profile
  - Reporting and Dashboards
  - Placement Tests
- Constituent Engagement Console - # activities
- Check in / out
- Student Success Team Assignment
- Executive dashboards
- Athletic Advising & Tutoring
- Advising Notices: Probation, Suspension, Dismissal, Graduation, etc.

## 2.1 Release

**Outreach, New Users**

- Student Success Dashboard: shared across campus amongst advising, student affairs, student services and faculty
- Flag student profiles for attention – event triggers plus regular review
- New users:
  - Athletics Coordinators and Tutors
  - Student Affairs: Student Conduct, Career Services, Disability Services
  - RAs
  - Select faculty advisors, mentors and instructors
- Enhance reporting dashboards

## 2.2 Release

**Alerts, Scoring, Treatment**

- Student welcome and success campaigns via mass email via Marketing Cloud
- Intra-campus alerts and working of student ‘cases’
  - Faculty Early Alert – High Risk Courses
  - Staff from across campus departments
- Initial set of engagement scoring and treatment strategies – pre determined and ad hoc
- Refine workflows for advisors, student services staff & faculty
- Enhance reporting dashboards

### Scope Currently Under Review

- Integration with D2L
- Migrations: BBA, Leeds, Law
- CEAS Graduate Students Marketing & Student Success
- Graduate School

---

**Timeline**

- **March – May 2016**
- **Summer 2016**
- **Fall / Winter 2016 – Spring 2017**
MyCUHub Today

Welcome to Academic Advising

- Meet with your Advisor
- Add, Drop, Change, or Interested in Major/Minor (contact Certificate program directly)
- Explore Field of Study
- Change My Schedule
- Plan for Future (Including Study Abroad)
- Talk About My Grades (Including Probation, Dismissal, Suspension)
- Pre-Health Advising
- Pre-Law Advising

Check your degree audit for applicability for your degree plan(s).

Undergraduate

Undergraduate Performance

|                | Hours Passed | GPA
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<tbody>
<tr>
<td>Cumulative</td>
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<td>N/A</td>
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<tr>
<td>Business GPA</td>
<td>4</td>
<td></td>
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<tr>
<td>Cumulative GPA</td>
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GPA Trend

GPA Trends (cumulative vs term)

Links

- Degree Audit
- MyCUInfo

Academic Major/Minor

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<th>Career</th>
<th>Code</th>
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<td>ENVS-BA</td>
<td>Environmental Studies</td>
<td>Major</td>
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<tr>
<td>UGRD</td>
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<tr>
<td>UGRD</td>
<td>ENGL-BA</td>
<td>English</td>
<td>Major</td>
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Upcoming Meeting

- 9am - 10am DST test Ralphie Advisor
  03/09/2016 9:00 AM MST
  Status: Confirmed

- 9am - 10am DST test Ralphie Advisor
  03/17/2016 9:00 AM MDT
  Status: Confirmed

Links

- Degree Audit
- Singularity
- Campus Solutions

Albert’s Student Groups
Leveraging Existing Components to Build a Student Success Workspace

Extending use to NSFP, Athletic Coordinators, Tutors, Student Affairs and Student Services

**Expected Behavior:**
- New Courses filter option fields should mimic Program Plans and Selected Program Plans

Only show assigned Student Athletes from Success Team when user is an Athletic Tutor (student worker).
Enterprise CRM Adoption and Use – March 2016

Users Logged In

- 30,099 Students
- 175 Advisors
- 284 Communicators
- 12 Office of Industry Collaboration Staff
- 10 Office for Performance Improvement
- 32 CRM Program / CoE
  - People and integration agents

Information Added to Salesforce

- # of Contacts

- # of Task and Activities

- # of Reports

Groups

- Total # of Chatter Groups
- Top 10 Most Popular Groups by Members
- Groups - # of Comments
NEW CRM Projects Backlog
Stage: Approved

- **Anschutz**
  - School of Pharmacy: Student Recruiting & Student Success

- **Boulder**
  - Sustainable Practices Program: Lead Tracking & Contact Management
  - Disability Services: Student Success
NEW CRM Project Requests
Stage: Project Intake

› **Anschutz**
  - School of Nursing: List Uploads and Lead Tracking

› **Denver**
  - CU Online Marketing
  - School of Business: List Uploads and Lead Tracking
  - Graduate School Student Marketing and Recruiting

› **Boulder**
  - Conference on World Affairs: Marketing, Events, Constituent Management
  - Dedicated Desktop Support
  - Center for American West
  - GEIR (part of Entrepreneurial Group of Law School)
  - College of Engineering & Applied Sciences – Graduate Student Marketing and Student Success
Questions and Comments