IT Governance

Information Technology is a catalyst for productivity, creativity and community that enhances learning opportunities in an environment of unlimited demands and limited resources.

Executive Committee Meeting
May 19, 2017

• Adopting a strategic approach to information technology planning, budgeting and implementation at Cal Poly Pomona •
Executive Committee
Action Items

• **Administrative Technology Working Group / Recommendation**
  • Digital Signature Solution

• **Communications Technology Working Group / Recommendation**
  • SMS Messaging to Students
  • Campus Map

• **Space and Event Management Working Group / Recommendations**
  • Event Management Tool
Administrative Technology
Digital Signature Solution

**Background:**

- The majority of our processes rely on paper forms with wet signatures. They are time consuming and costly.
  - Printing
  - Approvals
  - Mailing/routing
  - Scanning/storage
  - Retrieval/retention/shredding

- Departments are looking for their own digital signature solution. The campus is ready to move forward with a standard solution.
Benefits of Using a Digital Signature Solution:

- Cost savings – Labor, printing (paper), mailing (postage)
- Time savings – Resources required to handle and track forms
- Mobility – Ability to sign forms 24 x 7 from any location
- Security – Secure document transmission via standardized business processes
- Visibility – Status of approvals visible to authorized users
Recommendation 1:

• Implement an enterprise digital signature solution

• Two-phased implementation:
  - Phase 1  Digital signature solution (DocuSign)
  - Phase 2  OnBase (PolyDoc) integration
Recommendation 2:

• Implement a cost-sharing model for the software license.

• One-time startup fee will be funded by IT.

• First year subscription cost is distributed among Academic Affairs, Administrative Affairs and Information Technology.

• Subscription cost for subsequent years will be distributed among divisions using the system.

• Phase 2 (OnBase Integration) costs will be funded by IT.
# Startup Cost

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<tr>
<th>Cost*</th>
<th>Comments</th>
<th>Funding Source</th>
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<tbody>
<tr>
<td>Annual Fee for the Services</td>
<td>$41,800</td>
<td>Academic Affairs, Administrative Affairs, Information</td>
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<tr>
<td>for Internet2 Members</td>
<td>80%+ discount</td>
<td>Technology</td>
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<td></td>
<td>First year maintenance waived</td>
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<td>One-Time Startup Fee for</td>
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# Subsequent Years

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<td>Technology</td>
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<td></td>
<td>Technology &amp; other divisions</td>
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Cost for OnBase (PolyDoc) Integration

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<th>Cost</th>
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<td>OnBase Integration</td>
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<td>Annual Maintenance</td>
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<td><strong>Total</strong></td>
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<td><strong>Information Technology</strong></td>
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Cost estimate as of January 9, 2017
Communication Technology
SMS Messaging to Students

Presenter: Tim Raymond
Communication Technology
SMS Messaging to Students

- Recommendation – Background
  - A number of actions on the part of students are required to ensure student success.
  - Some students are unsure of what actions they need to take and when.
  - The campus’s standard practice has been to send email to students to remind them of actions that they need to take.
  - Students receive a large number of emails from Cal Poly Pomona; they miss or ignore many including ”high value” messages that are intended to ensure their success.
Communication Technology
SMS Messaging to Students

• Recommendation – Findings
  • Cal Poly Pomona needs to utilize different methods to communicate to students.
  • New communication methods need to leverage tools and techniques that are familiar to and expected by students.
  • SMS is a part of most students’ everyday lives.
Communication Technology
SMS Messaging to Students

• Recommendation – Findings

165 of 171
96.5%

6 of 171
3.5%
Communication Technology
SMS Messaging to Students

• Recommendation – Findings

“Cpp is the best!”

“Bless your souls CPP”

“Wow I didn't think that this would make me feel so happy lol...thanks CPP!!”

“this is awesome!
Because college students are usually going through mental breakdowns. Lmao”

“This LITERALLY reminded me to pay for my fees cuz all my projects and assignments are due this week cuz it's the end of the quarter 😭”

“Can you guys fix the clock in building 9 room 303?”
Communication Technology
SMS Messaging to Students

• Recommendation – Considerations
  • Does not impact emergency communication messages
  • Does not disclose any specific info
  • Need “opt” mechanism
    • Allow students to control their “opt” preferences
    • Marketing campaign to collect “opts”
    • *Opt out is currently available from all non-emergency messages
  • Need to manage wrong numbers so as not to message people not affiliated with CPP
    • SMS Platform provides this functionality
Communication Technology
SMS Messaging to Students

- Recommendation

Use SMS Messaging to communicate with students
Recommendation – Preparation

- Increase the number of phone numbers that are identified as mobile in PeopleSoft
  - Beginning of Winter 2017 – 3,501 student mobile numbers
    - 14%
  - Before Winter Emergency Test – 12,953 student mobile numbers
    - 52%
  - March 1 – 21,628 student mobile numbers
    - 88%
- Efforts to capture/validate numbers will be ongoing
Communication Technology
SMS Messaging to Students

• Recommendation
  • SMS messages must meet either of the characteristics below:
    • The message is related to campus safety.
    • The message involves an issue that affects a targeted audience’s enrollment status and needs additional reinforcement beyond usual communication vehicles (i.e. email)
      • Ex. Non-payment of fees, Emergency Contact Hold
    • Messages must be approved by A.V.P. of Student Success or designate and/or A.V.P. Enrollment Services.
    • Messages always have the same format.
      • Ex: CPP: Action Required – Lorem Ipsum
        http://www.cpp.edu/l0r
Communication Technology
SMS Messaging to Students

- Recommendation
Communication Technology
SMS Messaging to Students

• Recommendation – Schedule & Milestones
  • Draft SMS sending guidelines – Winter 2017
  • Create “Opt” management interface – Summer 2017
  • Include with Orientation – Summer 2017
  • Create process to manage wrong numbers – Summer 2017
  • Send first message – Fall 2017
Communication Technology
SMS Messaging to Students

• Recommendation – Risks
  • Legal – person unaffiliated with CPP may receive an unwanted message (wrong number)
    • Wrong number process will be in place, but may only take one message to the wrong person to cause issue
  • Disclosure of sensitive info
    • Mitigated with multiple approvals for sending messages
Communication Technology Campus Map

Presenter: Tim Raymond
Communication Technology
Campus Map

• Recommendation – Background/Findings
  • Current campus map
    • Fairly static, not aligned with user expectations
    • Functional? Yes. Attractive?
    • Simple categories
      • Building
      • Open Space
      • Parking
    • Requires web team to add/update
    • No “virtual tour” capability
    • No ability to generate PDF maps
Communication Technology
CampusMap

• Recommendation – Background/Findings
  • Replace with “Campus Bird” solution
    • Is driven by a content management system
    • Allows decentralized updates
    • Authorized users can create custom map categories
    • Categories can be permanent or temporary
      • Buildings, Parking, Open Space
      • Construction, Commencement, Wine Tasting Event
  • Supports multiple virtual campus tours
  • In use by CSU San Marcos, San Diego State University, CSU Channel Islands
  • Chico currently reviewing contract terms
Communication Technology
Campus Map
Communication Technology
Campus Map

- **Recommendation – Funding Recommendation**

- **Purchase:** $25,250
  - Yearly: $6,588 + any additional functionality (additional building renders, etc.)

- **Recommendation – Schedule & Milestones**
  - Typical implementation is approximately 3 months.
  - Target launch in Fall Quarter
    - If procurement is completed by the end of May target launch by beginning of Fall term
    - Would allow tours to be ready before beginning of next application cycle Oct. 1
• Recommendation – Risks
  • Accessibility
    • Solution provides a full text only map
    • Next release (Spring) which would be the version we implement will include accessibility enhancements on both the graphical map (aria labels and improved keyboard/screen reader navigation) on the graphical map as well as the text only version (better navigation)
    • Vendor is eager to work with campuses to improve accessibility
    • ATI Office performing review currently
Space & Event Management
Informational/Action Items

Presenters: Dr. Byron Howlett and Sarah Larrabee
1. Working group meeting since September 2016

2. Surveyed current market and other CSU campuses

3. Three main software systems
   - AdAstra
   - College Net (Series 25 or 25Live)
   - EMS (Event Management System) currently used by campus
1. Telephone conversations with EMS, AdAstra, and College Net on Nov. 30th

2. Presentations given by EMS and College Net on Jan. 4th

3. Conducted community consultations on March 3rd
   • Two group presentations; staff and faculty
Space & Event Management Action Items

Presenters: Dr. Byron Howlett and Sarah Larrabee
Recommendation – Background/Findings

1. Majority of campus currently uses EMS
2. Decentralized scheduling across campus
3. Need for a campus wide solution
   A. User Friendly
   B. Integrated with PeopleSoft
   C. Provides Predictive Analytics
4. Aligns with President’s & University’s Student Success vision by offering advanced scheduling for three years
Recommendation – Funding Recommendation

1. Implement CollegeNet campus wide = $80,000.00
   A. Includes ASI and Foundation Services

2. Conduct a campus wide needs/space analysis

3. Establish a centralized scheduling office
Recommendation – Schedule & Milestones

1. Broad project plan from vendor

2. Roll out in phases
   A. Phase one – Establish a “go live” date & Implementation Timeline
   B. Phase two– Gather vendor’s best practices from other CSUs
   C. Phase three– User Training
   D. Phase four – Scheduling Office creates scheduling Policies and Procedures
Recommendation – Risks

1. Quarter to Semester sensitivity

2. Campus wide support

3. Onboarding – learning a new scheduling system