JOINT ADMINISTRATIVE COUNCIL AND STRATEGIC PLANNING MINUTES

March 10, 2022

The Administrative Council and Strategic Planning Committee met on Thursday, March 10, 2022 at 9:00 a.m. in the Athens State Ballroom. Present were Dr. Rick Barth; Ms. Toni Carter; Ms. Pam Clark, Recorder; Mr. Jonathan Craft; Dr. Joe Delap; Dr. Andrew Dollar; Dr. Mike Essary; Ms. Barbara Ferguson; Dr. Debbie Ferguson (Vartanian proxy); Ms. Jackie Gooch; Mr. Jeffrey Guenther; Ms. Beth Jenkins; Ms. Belinda Krigel; Dr. Kim LaFevor; Mr. Chris Latham; Ms. Sarah McAbee; Mr. Mike McCoy; Ms. Rachel O'Sullivan (K. Ferguson proxy); Mr. Benjamin Shepard; Mr. Derrek Smith; Dr. Stephen Spencer; Dr. Timothy Thornton; Mr. Gary Valcana (via Zoom); Dr. Philip Way; Dr. Catherine Wehlburg; Ms. Jennifer Wolfe; and Dr. Lionel Wright. Mr. Jamie Adams, Mr. Ronnie Chronister, Mr. Richard Collie, Ms. Laura Beth Horn, Mr. Jeff Powers, and Ms. Gabrielle Whitney were absent. Special guests were Mr. Gary McCullors and Mr. Jerry Stephens. EAB team members via Zoom were Mr. Ron Yanosky, Mr. Matt Hagerty, and Ms. Alyx Margine.

Dr. Way convened the meeting at 9:00 a.m. and welcomed everyone. He stated the focus of the meeting is digital transformation. Dr. Way had previously requested a presentation from EAB to inform the members about Edify, one of EAB's solutions to digital transformation.

Dr. Way asked for any corrections to the February Administrative Council minutes or the Strategic Planning minutes. There were no corrections and they were each approved on a voice vote.

Dr. Way turned the meeting over to Ms. Krigel. She welcomed the EAB team and asked Mr. Yanosky to go forward with the EAB presentation. EAB team introductions were: Mr. Ron Yanosky, Research Director; Mr. Matt Hagerty, Director of Technology; and Ms. Alyx Margine, Director of Technology. The EAB team gave a presentation on "Unpacking Digital Transformation" (Attachment).

The members were divided into four groups for discussions on the Digital Transformation Action Plan (Attachment – page 22).

A. Group 1 – Carter, Delap, Dollar, Essary, Wehlburg and Wright

Improved Business Processes

What specific challenge in this area does our campus need to address?

- Too much paper processing on campus.

What initiative might help address this particular problem?

- Need electronic signatures process.

Data-Driven Decision Support

What specific challenge in this area does our campus need to address?

- We have multiple data sources but they do not always agree.

- We have to make sure our data is clean.

What initiative might help address this particular problem?

- Have one data source for trustworthy data.
- Create data dashboards for recurring data needs/requests and build a consensus for what tool we will use.
- Need dedicated staff to work on the dashboards.

B. Group 2 – Guenther, LaFevor, McAbee, McCullors, Shepard, Stephens and Wolfe

Prospect Recruiting

What specific challenge in this area does our campus need to address?

- Need for persona-based marketing – we have started.

Why has this challenge persisted despite previous efforts to improve?

- Limited technological resources.
- Lack of monetary resources to hire staff to oversee the process.

C. Group 3 – Craft, B. Ferguson, Gooch, Latham, O'Sullivan, McCoy, and Spencer

Improved Business Processes

What specific challenge in this area does our campus need to address?

- Form processing.

What initiative might help address this particular problem?

- Need an online tracking and electronic signature process for forms.
- Need support from the department from which the form originates.

D. Group 4 – Barth, D. Ferguson, Jenkins, Smith, Thornton, and Way

Student Services & Success

What specific challenge in this area does our campus need to address?

- Need to get campus-wide adoption of the tool.
- Educate our staff and faculty on our tools.

Why has this challenge persisted despite previous efforts to improve?

- Is the same technology going to remain?
- Need to have discussions/training about the tool outside of SSS.

What initiative might help address this particular problem?

- Suggestion made for Enrollment Council to create a plan which shows faculty the use of the tool.

Mr. Yanosky thanked everyone for their comments. He turned the meeting over to Mr. Hagerty and Ms. Margine, who gave a demonstration on Edify.

Questions and Answers:

1. Dr. Way – Can Edify estimate the positive net revenues in each program? Mr. Hagerty stated it could and gave an example of the University of Montana.
2. Ms. Krigel – Asked for experiences from other institutions. Can we use our skill sets with Edify. Mr. Hagerty gave examples of institutions creating models that best suit them. Tools that are currently being used (e.g., SPSS) can connect directly to Edify.
3. Ms. Krigel – Can we develop our own models? Mr. Hagerty stated yes. They have partners that have built out from the model.
4. Dr. Wright – previously thought of Edify as an ERP synchronization, but the presentation shows more of a data analysis and warehouse type system. How does Edify tie in? Mr. Hagerty stated Edify as a tool is very flexible and gave examples.
5. Mr. Guenther – Can Edify disaggregate data or is it only for creating visualizations and dashboards from aggregated data? Mr. Hagerty stated it is both. The EAB team can demonstrate what Edify can do for specific departments when time allows.

Dr. Way thanked the EAB team and his colleagues for their time and comments. The meeting adjourned at 11:00 a.m.

Respectfully submitted by: Pamela Clark

Attachment: "Unpacking Digital Transformation" PowerPoint Presentation

EAB

Unpacking Digital Transformation

The Foundation You Need to Build a Technology and Data Strategy for the Future

March 10, 2022

Joining Us Today

Ron Yanosky
Director, Research Advisory Services

RYanosky@eab.com

Matt Hagerty
Director, EAB Technology

MHagerty@eab.com

Please share questions and comments in the chat throughout today's presentation

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EAB Offerings Support Institutions in **Addressing Today's Biggest Challenges**

Institutional Success

Preparing Institutions For the Future

Research focused on driving outsized gains in school strategic and operational performance

~1,100 Institutions

8,000+ Peer-tested best practices

Student Success & Analytics

Supporting and Graduating More Students

Comprehensive technology platforms aimed at increasing student retention and streamlining operations

~1,100 Institutions

9.5M+ Students supported by our SSMS

Enrollment Success

Finding and Enrolling Right-Fit Students

Technology-enabled marketing and analytics offering aimed at enrolling right-fit students

~1,300 Institutions

500+ Innovations tested annually

Serving **2,100+** institutions across North America, UK, Europe and beyond

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The IT Research Forum

Aligning Our Support to Your Most Critical 2021 Imperatives

Optimizing the IT Portfolio to Respond to Shrinking Budgets

- Streamline IT portfolio through **cost-benefit and utilization assessments**
- Prioritize cross-campus investment in **high-value applications**

Enabling Digital Innovation at Scale

- Partner with campus units to **automate low-skill services** and streamline processes
- Improve customer service and student experience through **enhanced digital literacy**

Accelerating the Impact of Data Investments

- Establish cohesive **data strategy and governance**
- Strengthen **enterprise architecture** and data management capabilities

Helping Institutions Understand and Prevent Security Risks

- Build the **business case** for campus-wide security protocols
- Mitigate escalating **cybersecurity threats**

Aligning IT Strategy with Institutional Priorities

Leveraging IT Forum's Breadth of Higher Education Expertise

EAB offers broad higher education knowledge with a deep expertise of IT issues and topics.

Prioritizing IT Perspective in Cabinet-Level Discussions

EAB can help leaders elevate importance of tech-enabled problem solving to craft a campus-wide digital strategy.

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Source: EAB interviews and analysis.

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Digital Transformation

Foundational Capabilities and High-Impact Investments to Stay Relevant in a Digital Era

Athens State University
10 March 2022

IT Forum

EAB

Digital Transformation

Foundational Capabilities and High-Impact Investments to Stay Relevant in a Digital Era

SESSION 1

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Campus is Not an Island

Digital Expectations Rising Among Campus Constituents...

Students

- Where can I get on-demand service on campus?
- How will I be prepared to use the latest technology in the workplace?

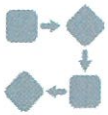
Faculty

- Why can't I access all of the student information in one place?
- Why do I have to sign on every time I want to download a resource?

Staff

- Why am I not getting an immediate response to my service request?
- Why don't we have user-friendly interfaces for administration?

...Creating Digital Service Demands for the Institution



Digital First

Online self-service available on-demand and as default means of interaction

Omni-present

Seamless experience available asynchronously across multiple devices

Hyper Personalized

Individualized content and services tailored to location, situation, etc.

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Source: EAB interviews and analysis.

1 Digital Transformation Defined

2 Opportunities for Higher Education

3 Workshop: Identifying DX Opportunities

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So…What *Is* Digital Transformation?

Digital transformation is the process of using digital tools—specifically data and technology—to deliver value and drive change.

The emphasis is not on specific technologies but on the application of those technologies to core strategies or operational challenges.

The scaling and widespread adoption of the solution in turn creates a culture of continuous improvement and sets the stage for further transformation.

Not technology for technology's sake

Solving big problems everyone agrees upon

Digital transformation is not one-and-done

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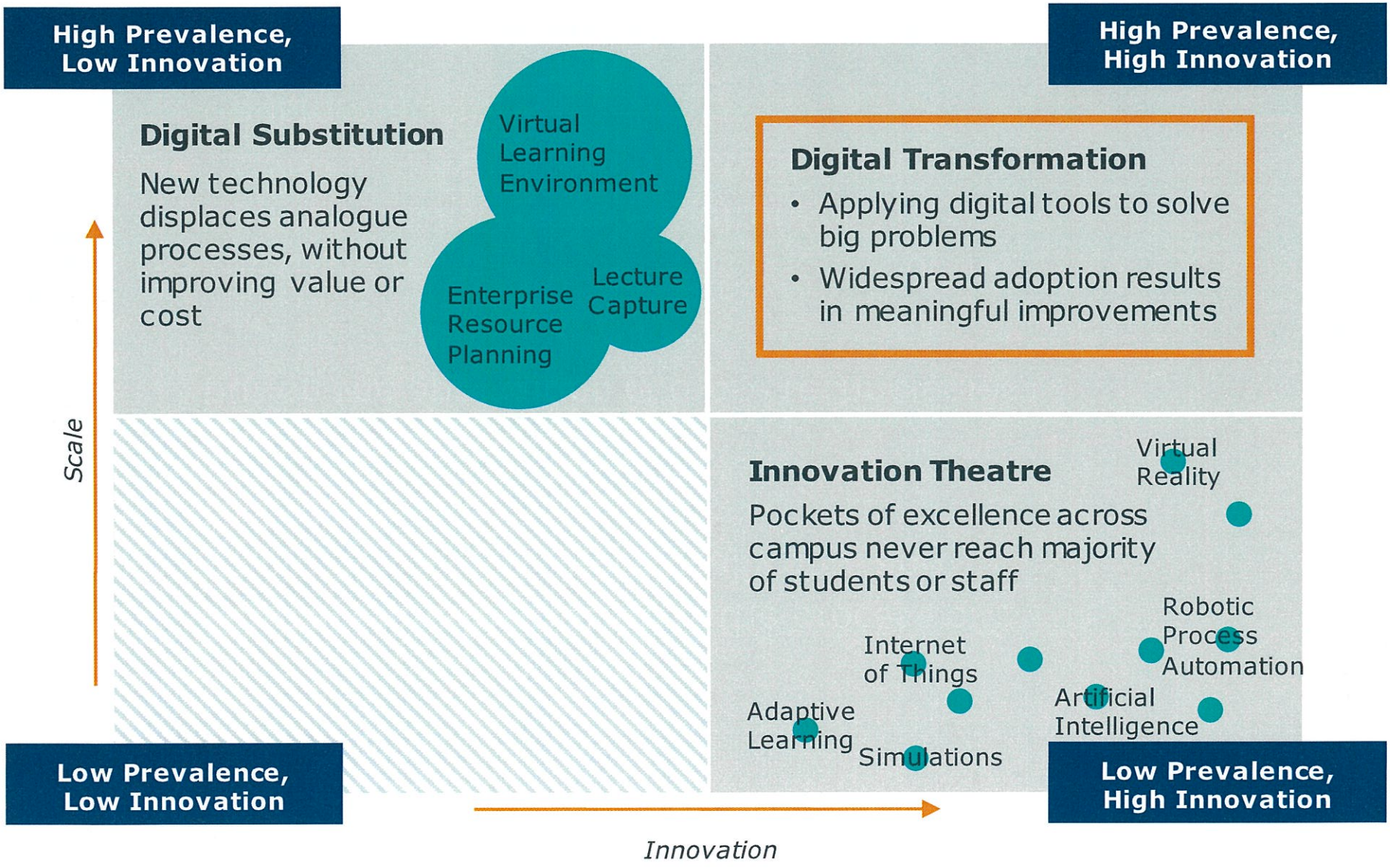
Source: EAB interviews and analysis.

Genuine Transformation Frustratingly Elusive



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Source: EAB interviews and analysis.

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Domains of High-Impact Digital Transformation Investments

- Personalized, Multichannel Prospect Communications
- Multimodal Instruction for Career Exploration and Lifelong Learning
- Predictive Facilities Operations and Space Management
- Frictionless Student Services and Success-Oriented Interventions
- Business Processes Aligned with Customer Needs
- Data-Driven Decision Making and Real-Time Analytics

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Bridging AI and Human Support

STAFFORDSHIRE UNIVERSITY

Staffordshire University's Beacon App Nudges Students to Success

- First AI assistant in UK HE sector
- Responded to 10K queries in the first month (January 2019), from ordering ID cards to locating lecture halls
- Student-driven product roadmap leads to new skills, like recommending clubs and societies
- 'Nudges' seek to non-intrusively intervene and promote success-oriented behaviors

Sample Beacon 'Nudge' Campaign

Problem

Unengaged students at risk of failing or dropping out

Institutional Knowledge

Relationships with assigned personal tutors improve attainment, retention

Nudge

Did you know your personal tutor is Dr. Staffs Beacon? You can reach out to her for advice!

Result

300 new relationships formed between students and personal tutors

Source: "Developing a Digital Strategy for Student Support with an AI Chatbot," *Times Higher Education,* 2019; Staffordshire University, Staffordshire, England; EAB interviews and analysis.

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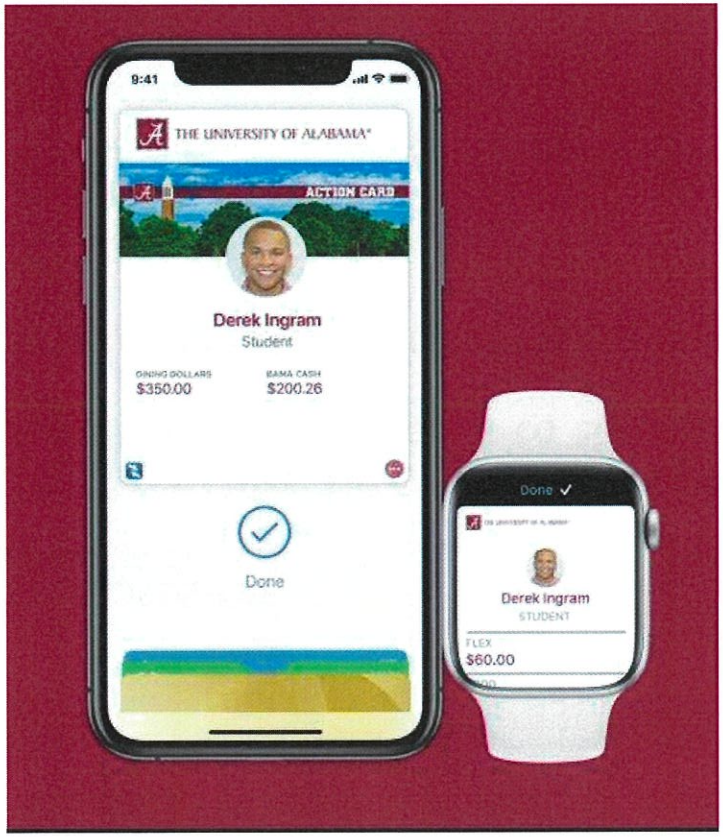
ID Cards Get Lost for Good

Mobile ID Cards Provide More Secure and User-Friendly Alternatives

Action Card Incorporated in Phones and Watches



Program in Brief

THE UNIVERSITY OF ALABAMA

- Alabama's physical ACT Card replaced by mobile ID cards in iPhones, Apple Watches, and compatible Android devices
- Students, faculty, and staff can access buildings, purchase meals etc. simply with their Phones and Watches
- All new students (plus students who lost their physical IDs) since 2020 required to use mobile ID cards
- Project a collaboration between UA's IT, Access Control, Bookstore, Event Access, Dining Services along with Transact, Apple, and Google

Benefits of Mobile IDs

- Not easily lost or shared: 5,000 physical cards lost in 2017
- Contactless access: Users simply present their phone or watch to NFC-enabled devices
- Efficient transactions: No fumbling around looking for cards or swapping between cardholders
- Environmentally friendly: No plastic wastage
- Easy to replace: Users can download, freeze when lost, and reactivate mobile ID cards remotely
- Enables business continuity: Chip cards difficult to procure during supply chain constraints

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Source: University of Alabama, Tuscaloosa, Alabama; EAB interviews and analysis.

Always in the News: Tools to Overhaul the Classroom

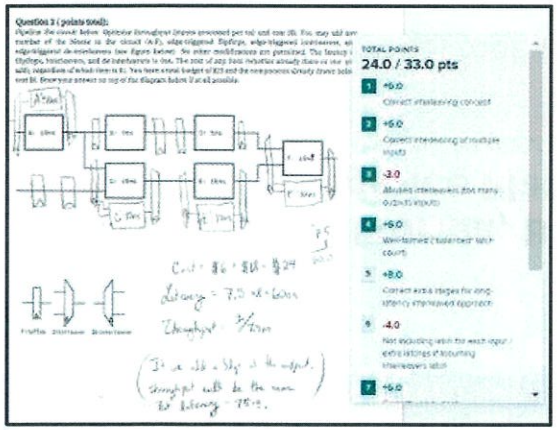
Automated Marking

Johns Hopkins University | gradescope

Rapid Feedback Delivered at Scale Frees Instructor Time

- Gradescope platform ensures consistent and speedy marking of student assignments, whether paper-based, digital, or code
- Instructor applies single marking to similar answers and responses

Sample Gradescope Rubric



Sentiment Analysis

University of St. Thomas

Student Facial Tracking Improves Teaching

- EmotionAPI platform monitors students' emotional trajectory during lectures via facial tracking software
- Instructors gain insight into student engagement and can tailor lectures to capture student interest

Chinese Universities Unsurprising First Movers in Classroom Facial Tracking

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Source: Mark Lieverman, "I Know How You Felt This Semester," *Inside Higher Ed,* February 20, 2018; Neil Connor, "Chinese Lecture to Use Facial-Recognition Technology," *Telegraph*, September 12, 2016; Gradescope; EAB interviews and analysis.

Self-Service Business-Intelligence Analytics

Berkeley
UNIVERSITY OF CALIFORNIA

University of California, Berkeley's Self-Service Business Intelligence Platform, "Cal Answers"

Features

- Self-service analytical tool accessible to staff, faculty, and students
- Centralizes all university data in one location (under the motto "One Question, One Answer")
- Contains premade reports and data visualizations to support common tasks and answer one-off inquiries

Cal Answers Data Sources

9 data sources provide 7 years of historical data:

- ERP
- Student Information System
- HR
- Finance
- Advancement
- Procurement
- Enrollment Management
- Financial Aid
- Accounts Receivable

5.5 Years to build initial system in phases

~$2M Annual costs for staff salaries to maintain system

Click here to access Cal Answers web portal.

Source: "Cal Answers," UC Berkeley, https://calanswers.berkeley.edu/home; University of California, Berkeley, Berkeley, CA; EAB interviews and analysis.

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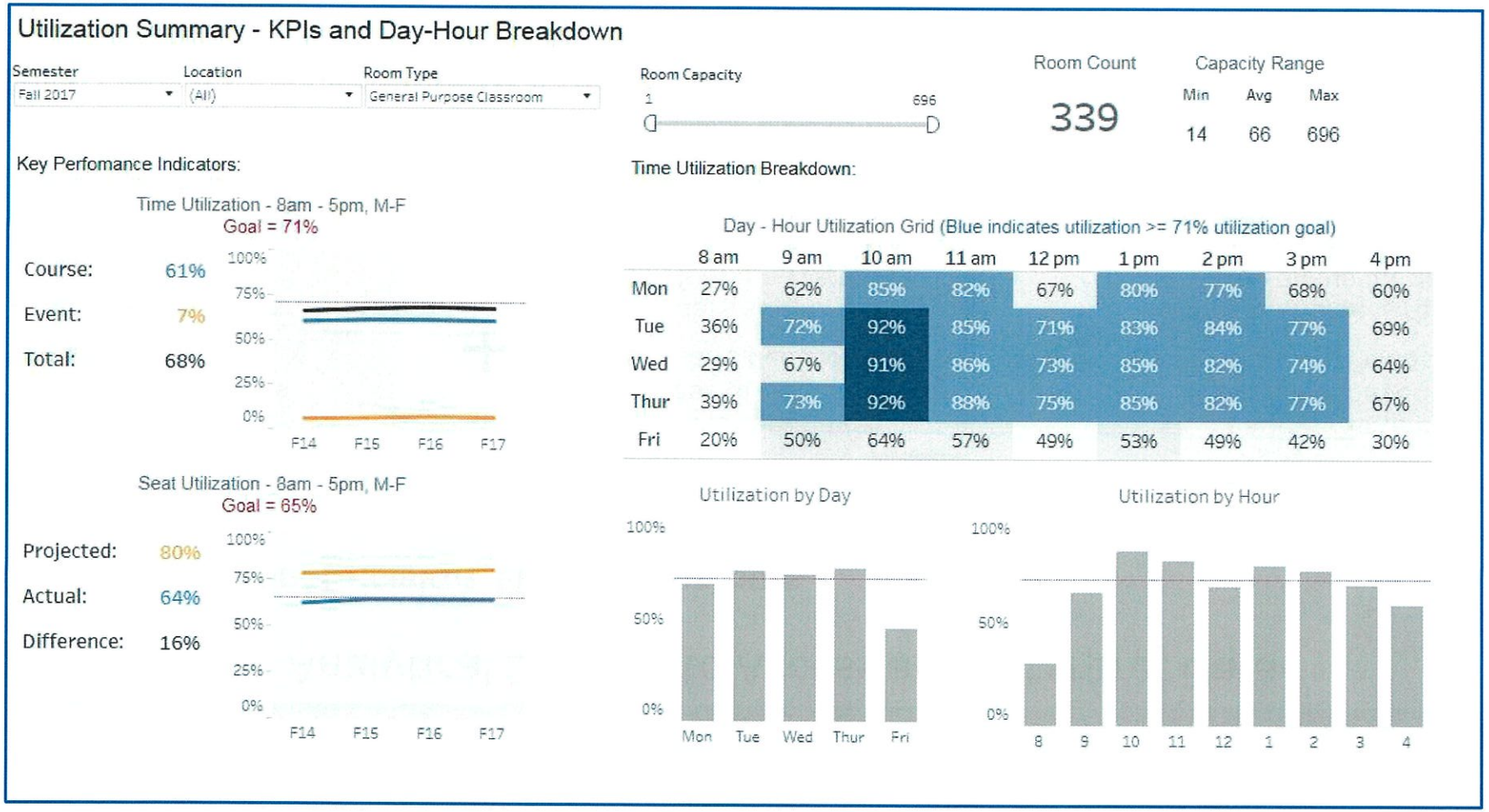
University of Minnesota (UMN)

UMN Uses Data Visualization Tool for Classroom Utilization Dashboard

UNIVERSITY OF MINNESOTA

Screenshot of UMN's Classroom Utilization Dashboard

tableau



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Source: University of Minnesota Classroom Utilization Dashboard, University of Minnesota, Minneapolis; MN; EAB interviews and analysis.

Better Data Isn't Enough

Leaders Need Analytical Support to Access and Interpret Data

The Data-Driven Decision-Making Formula

Data

- Central data repository houses clean data
- Standardized data architecture
- Data definitions are authoritative, accessible

+

People

- Unit leaders have access to data needed to make decisions
- Leaders supported by staff with advanced analytics and data visualization skills

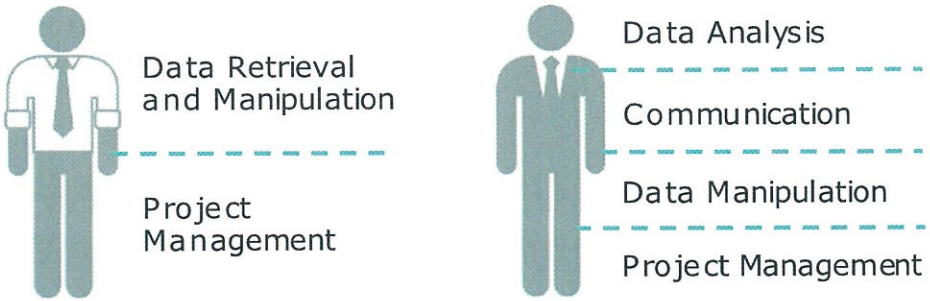
=

Decisions

- Leaders make decisions based on data, not instincts
- Stakeholders reach consensus on decisions more quickly

Data-Driven Decision Support Requires a New (and Expensive) Type of Staff

Legacy Data Staff: Programmer → *Emerging Data Staff: Business Intelligence (BI) Analyst*



24% Data Analyst job posting growth (2013 H2-2016 H2)

$80K Average BI Analyst base salary

Source: "Business Intelligence Analyst," Glassdoor, August 13, 2018; Burning Glass Labor/Insight; Business Affairs Forum interviews and analysis.

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1 Digital Transformation Defined

2 Opportunities for Higher Education

3 Workshop: Identifying DX Opportunities

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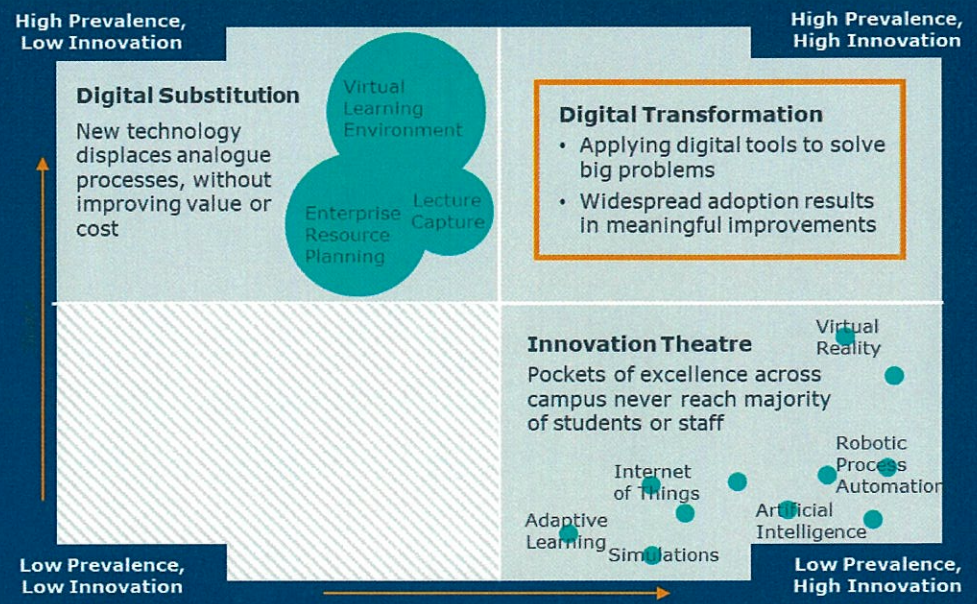
Recap: What Digital Transformation Looks Like

- Uses data and technology to deliver value and drive change
- Applies to core strategies or operational challenges
- Capable of scaling and widespread adoption



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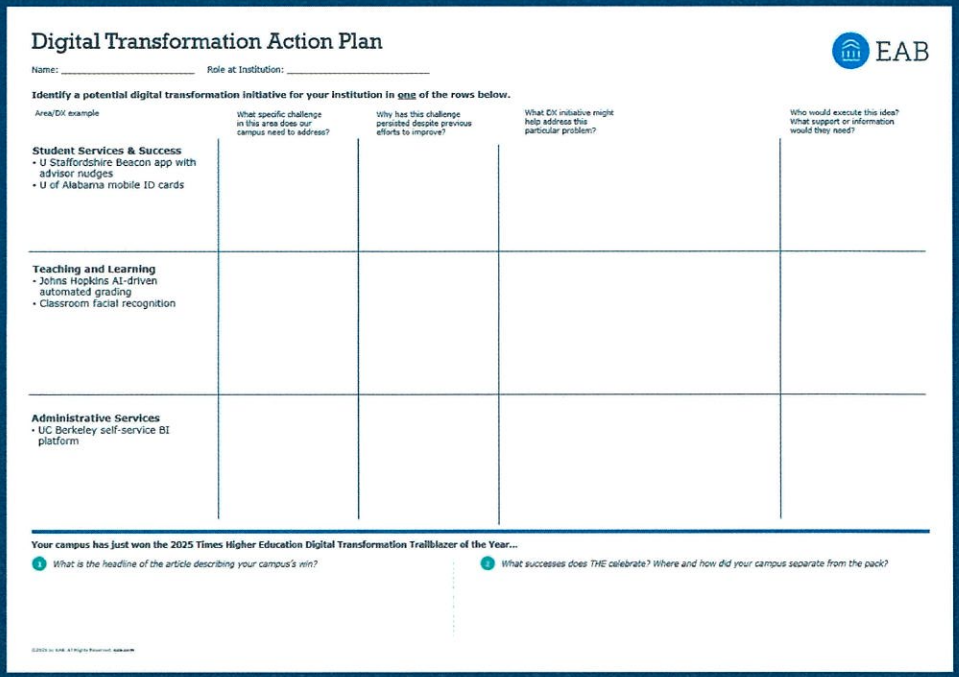
Source: EAB interviews and analysis.

Workshop Exercise

Take 10 minutes to:

- Identify an areas with DX potential
- Identify a specific challenge and possible DX solution
- Fill out the bottom area based on the *success* of the solution

Be ready to report your idea



Digital Transformation Action Plan

EAB

Name: _____ Role at Institution: _____

Identify a potential digital transformation initiative for your institution in one of the rows below.

Area/DX example	What specific challenge in this area does our campus need to address?	Why has this challenge persisted despite previous efforts to improve?	What DX initiative might help address this particular problem?	Who would execute this idea? What support or information would they need?
Student Services & Success • U Staffordshire Beacon app with advisor nudges • U of Alabama mobile ID cards				
Teaching and Learning • Johns Hopkins AI-driven automated grading • Classroom facial recognition				
Administrative Services • UC Berkeley self-service BI platform				

Your campus has just won the 2025 Times Higher Education Digital Transformation Trailblazer of the Year...

1. *What is the headline of the article describing your campus's win?*
2. *What successes does THE celebrate? Where and how did your campus separate from the pack?*

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Digital Transformation Action Plan

EAB

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Digital Transformation Capabilities Assessment

Assess Your Campus Digital Transformation Capabilities

Use this scoring scale to mark where your institution falls in terms of performance across the organisational and IT department capabilities below.

1	2	3	4
We are far behind and must devote significant resources to improve	We are behind and need additional support to improve	We are satisfied with our performance but can do better	We are a sector leader in this area

Organisational Capabilities

Capability	Description
Executive Sponsorship for Digital Ambitions	Senior management ur organisational continui technology in our strat to realise them.
Process and Customer Journey Mapping	We understand and reg digital expectations. Di and 'customer' engage from the start.
Portfolio-Minded Project Prioritisation	Senior leaders agree or By adopting a portfolio sequencing, or reuse is budgetary investments.
Digital Literacy and Engagement Campaigns	We recognise that pron responsibility of the IT or under-estimating dig needed digital skills

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Assess Your Campus Digital Transformation Capabilities

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We are far behind and must devote significant resources to improve	We are behind and need additional support to improve	We are satisfied with our performance but can do better	We are a sector leader in this area

IT Department Capabilities

Capability	Description	Score
Integrated Digital Platforms	We minimise costs in our technology portfolio through scalable enterprise architecture. Our IT systems and data capabilities deliver competitive advantage through speed, flexibility, and agility, with no constraints to performance from legacy systems.	
Future-Oriented IT Skills	Ongoing IT staff training and hiring supports the current digital strategy and actively anticipates future skills and knowledge requirements. IT staff understand institution-wide workloads and strategy and provide proactive input into digitisation and process improvement projects.	
Trend and Opportunity Sensing	Our IT staff are motivated by change and actively engage in environmental scanning, competitor analysis, and trend identification. We communicate to others the potential impact those trends may have on our mission, strategy, and business model, as well as on the higher education sector.	
Roadmap to Support and Scale Innovation	We pilot customer-driven innovations to ensure that any potential risks from new endeavors are contained and do not metastasise across the institution. Successful pilot project are celebrated and scaled up. We design centrally-driven innovations to generate new value for stakeholders, prioritising cloud-based solutions.	

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For resources related to your opportunities for improvement, visit eab.com/digitaltransformation

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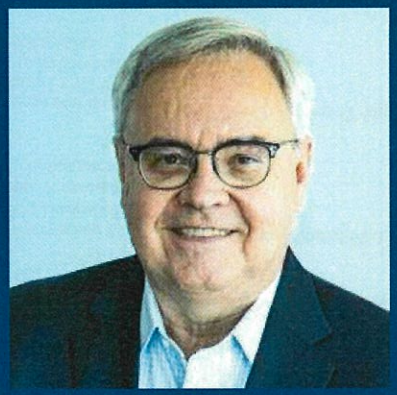
Presenting Today
Meet your EAB team member



Ron Yanosky, Ph.D.
Research Director

ryanosky@eab.com

Ron Yanosky is a director in EAB's Research and Advisory Services organization, where he frequently gives presentations and conducts workshops for campus partners both online and in person. His areas of expertise include information technology, business affairs, and estates management. He is actively involved in EAB's best practices research, and recently led a project investigating higher education remote work strategies.

Prior to joining EAB, Ron held research positions at EDUCAUSE and at Gartner Inc. During the 1990s, he was an assistant professor of history at Harvard University. He earned his Ph.D. at the University of California at Berkeley.

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Edify Introduction and Demonstration

A Higher Ed Data and Analytics Solution

SESSION 2

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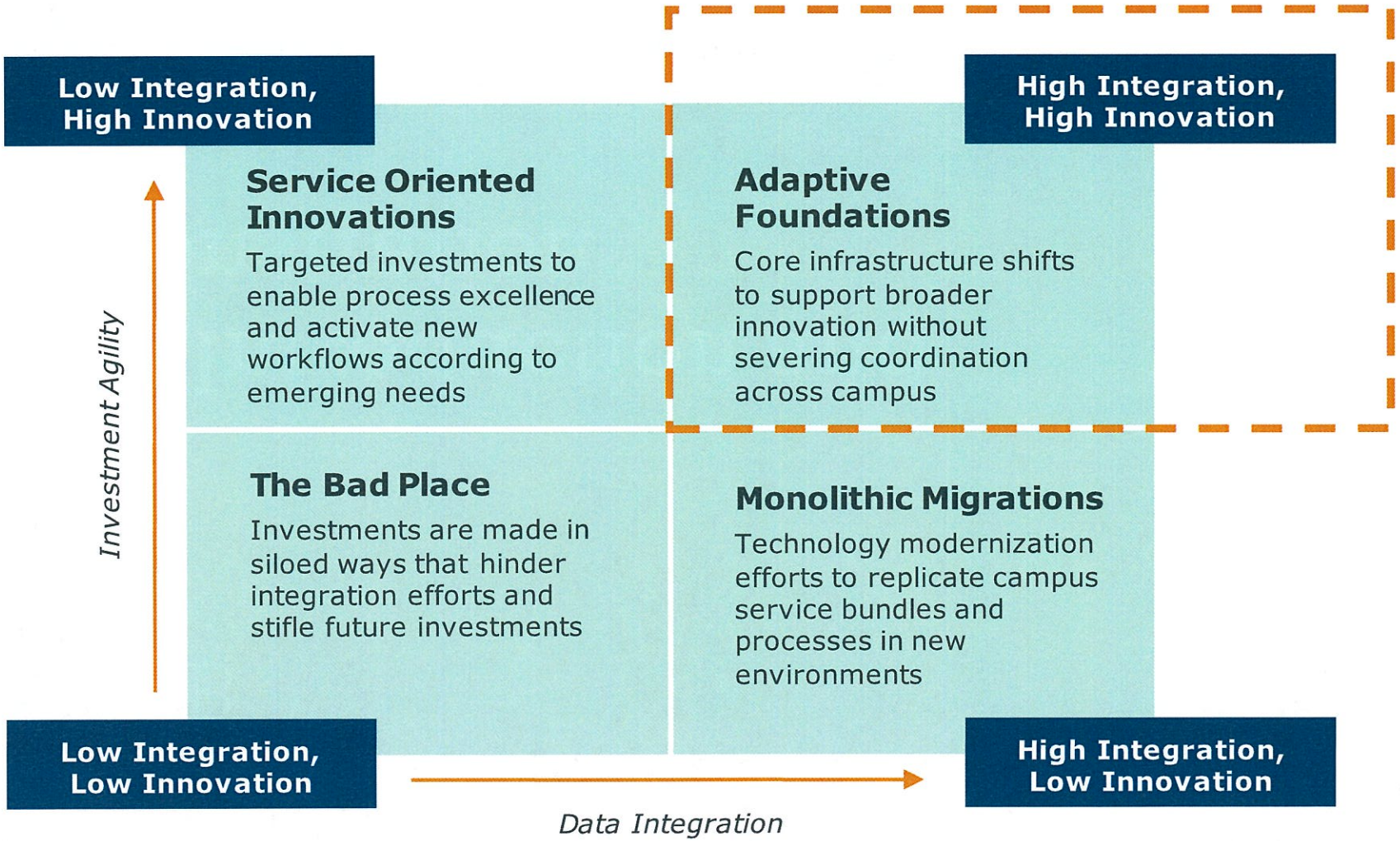
Today's Campus Tech Roadmap

Ongoing Investments Fall Into Three Main Categories

Technology Investment Strategies for Digital Agility



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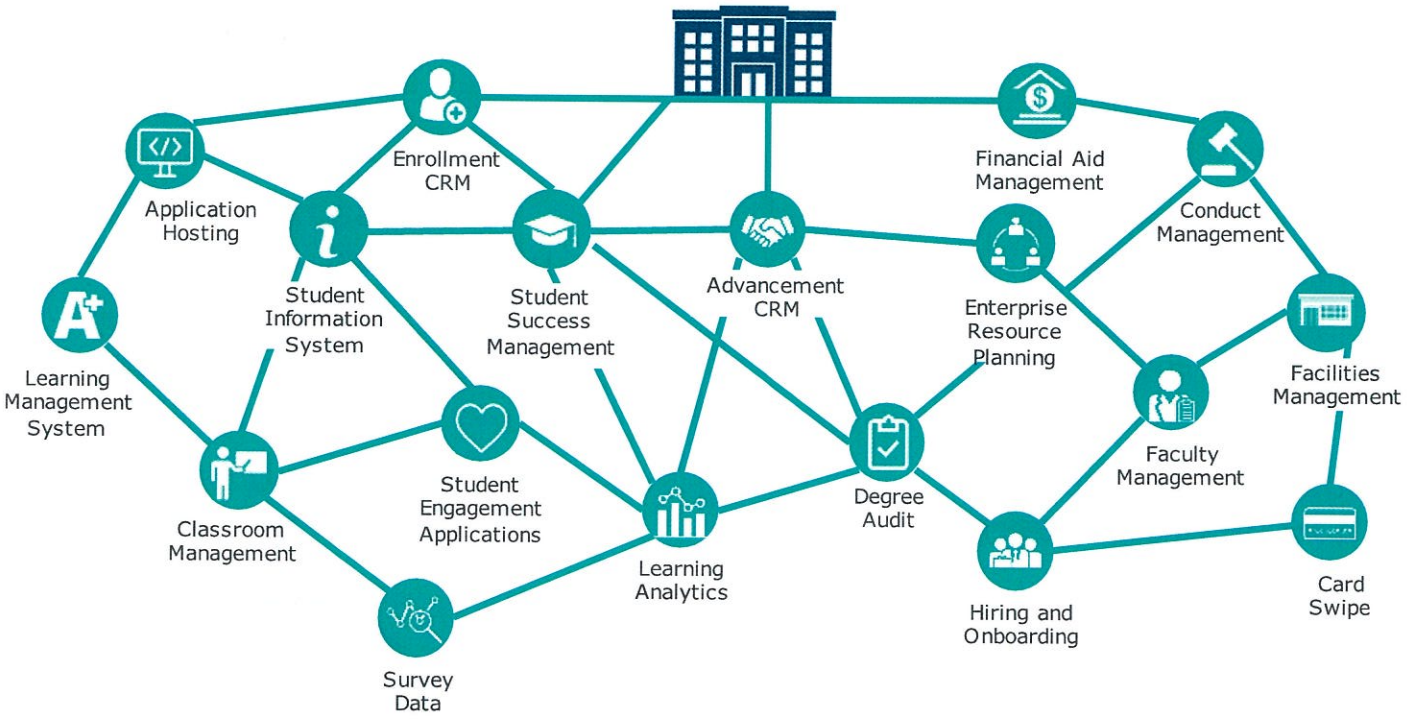
Source: EAB interviews and analysis.

A Challenging Environment for Data Initiatives



1 Constant Integrations Lead to Architecture by Accident

"We can only do the minimum needed to say, "it's integrated!" so we can move on to the next."

2 Competing Narratives Resulting from Siloed Data

"There are five different numbers for freshman enrollment depending on who you ask."

3 Institutions Are Data Rich, But Insight Poor

"Our President has a question today, but it will be 3-4 weeks until we can provide the answer."

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A Path for any Roadmap

Centralized Controls and Decentralized Capabilities Deliver Results

Centralized Data
to hardwire governance

- ✓ Aggregate data across disparate source systems
- ✓ Simplify complex system data structures
- ✓ Document integration transformations
- ✓ Define and communicate enterprise definitions

Decentralized Activation
to accelerate innovation

- ✓ Access trusted data sources directly
- ✓ Explore data with intuitive, low-code tools
- ✓ Apply data to local problems and strategies
- ✓ Access direct support for interpreting analytics

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Source: EAB interviews and analysis.

A Data & Analytics Solution Designed Specifically for Higher Education

Edify

Centralized Data + Decentralized Activation

Bring Your Data Together

Access and Warehousing

Cloud-native, secure, infinitely scalable data lake and warehouse to support critical institutional use cases

- Data ingestion through a library of pre-built higher ed system connectors or custom extraction
- Data consolidation and previewing across sources
- Downstream data delivery and system integration
- Data transformation
- Snapshotting
- Data archiving and back-ups

Build a Culture of Data Confidence

Data Governance

Higher ed best-practice rules and validations to ensure golden record/ single source of truth

- Full 'glass box' higher ed best-practice data model
- Data dictionary
- Data lineage
- Data profiling and quality assessment
- Validation rules
- Permissions management
- Data processing logs and monitoring

Empower Your Team with Insight

Reporting and Analytics

Self-service, custom, and pre-built analytics to drive efficiency and/or support decision-making

- No or low code data exploration, analysis, and ad hoc reporting
- Operational and compliance reporting
- Data visualization through your preferred business intelligence tools
- Pre-built, customizable analytics for higher ed strategic use
- Self-service predictive modeling

Build Your Team's Capacity

Professional Service Hours

EAB support to meet you where you are: Your team's use of Edify can be self-service, partially-, or fully-managed by EAB.

Strategy and Culture Support

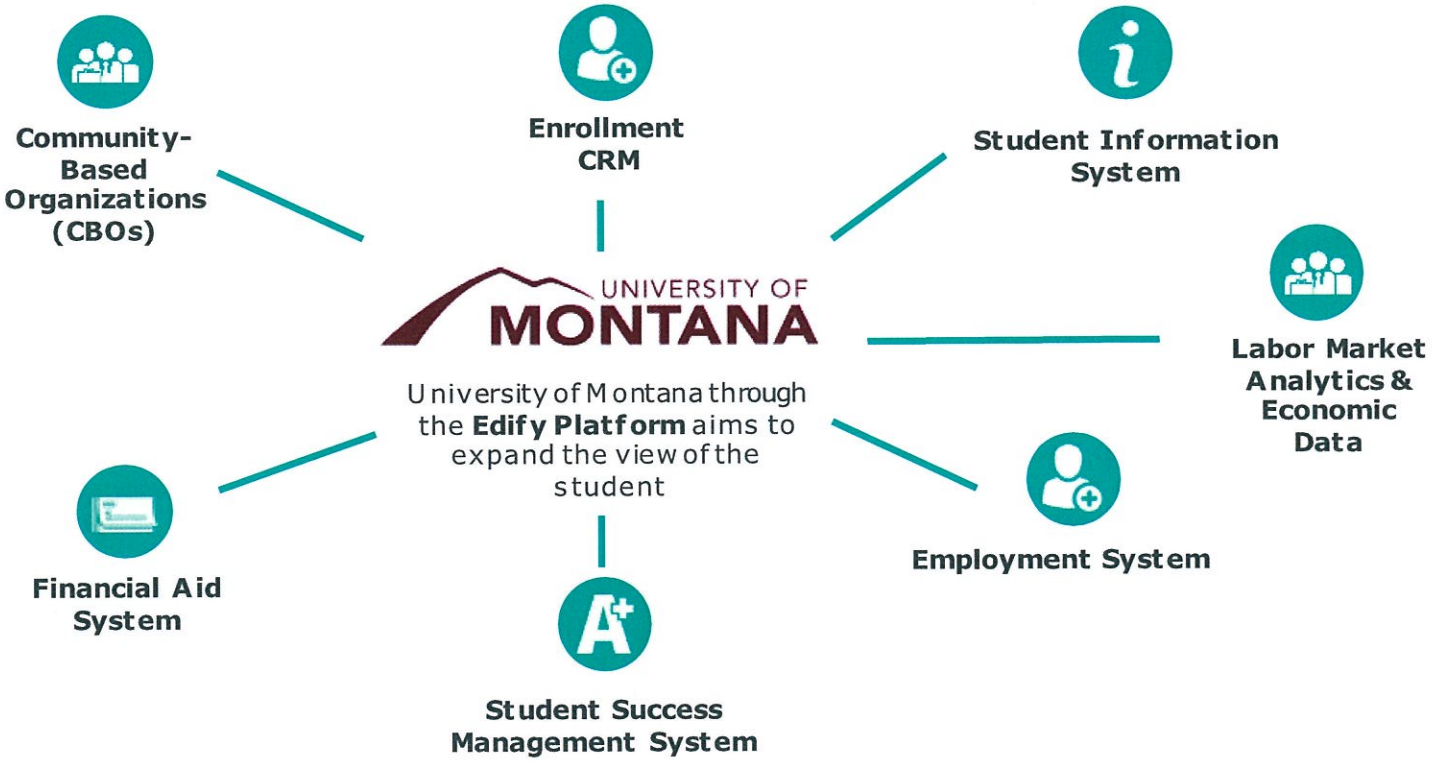
Process Consulting

Integration Services

Data Science and Analysis

Expand the View of Student Experience

Unifying Systems that House Student Data



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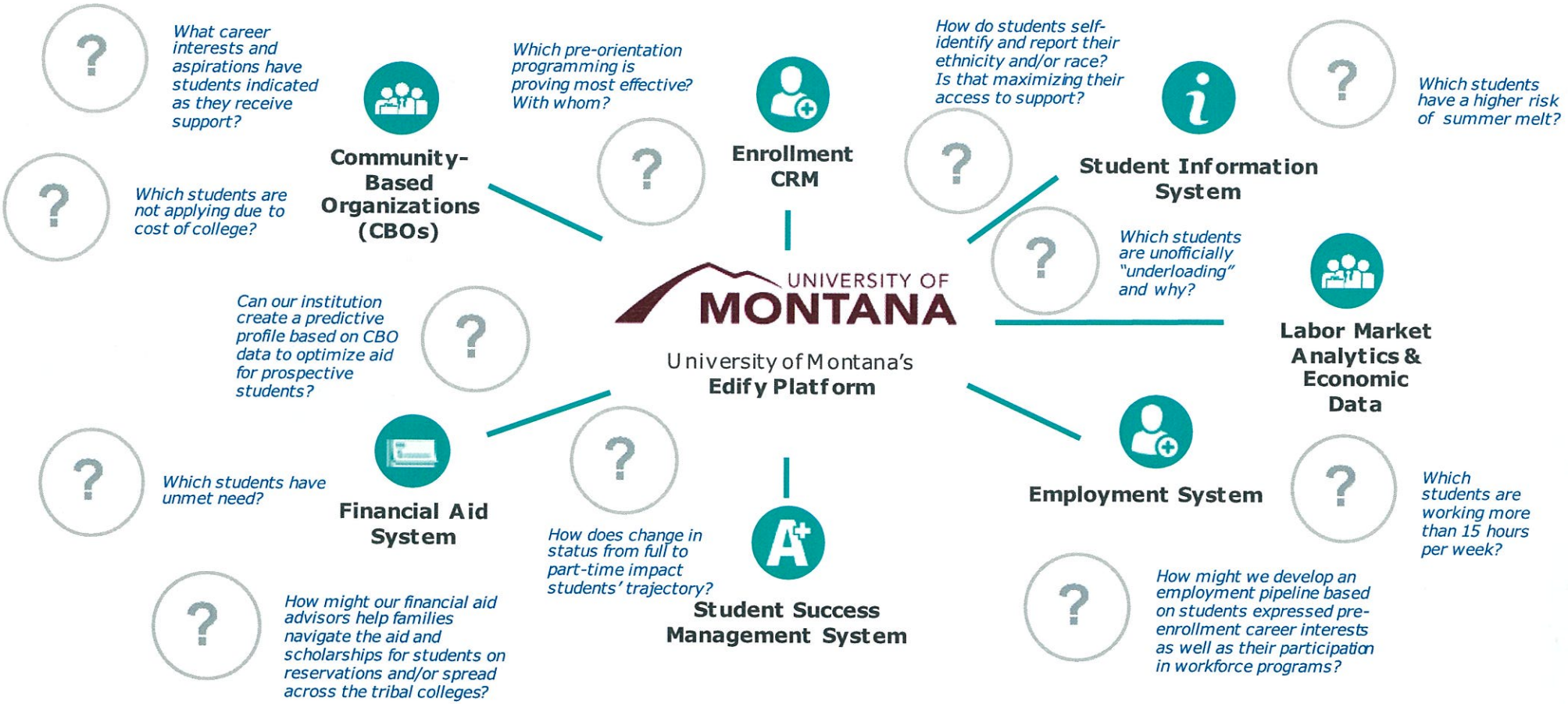
Eager to Maximize Students' Return on Education

Tackling "Price Sensitivity," Reducing "Total Cost," Improving Financial Decision-Making



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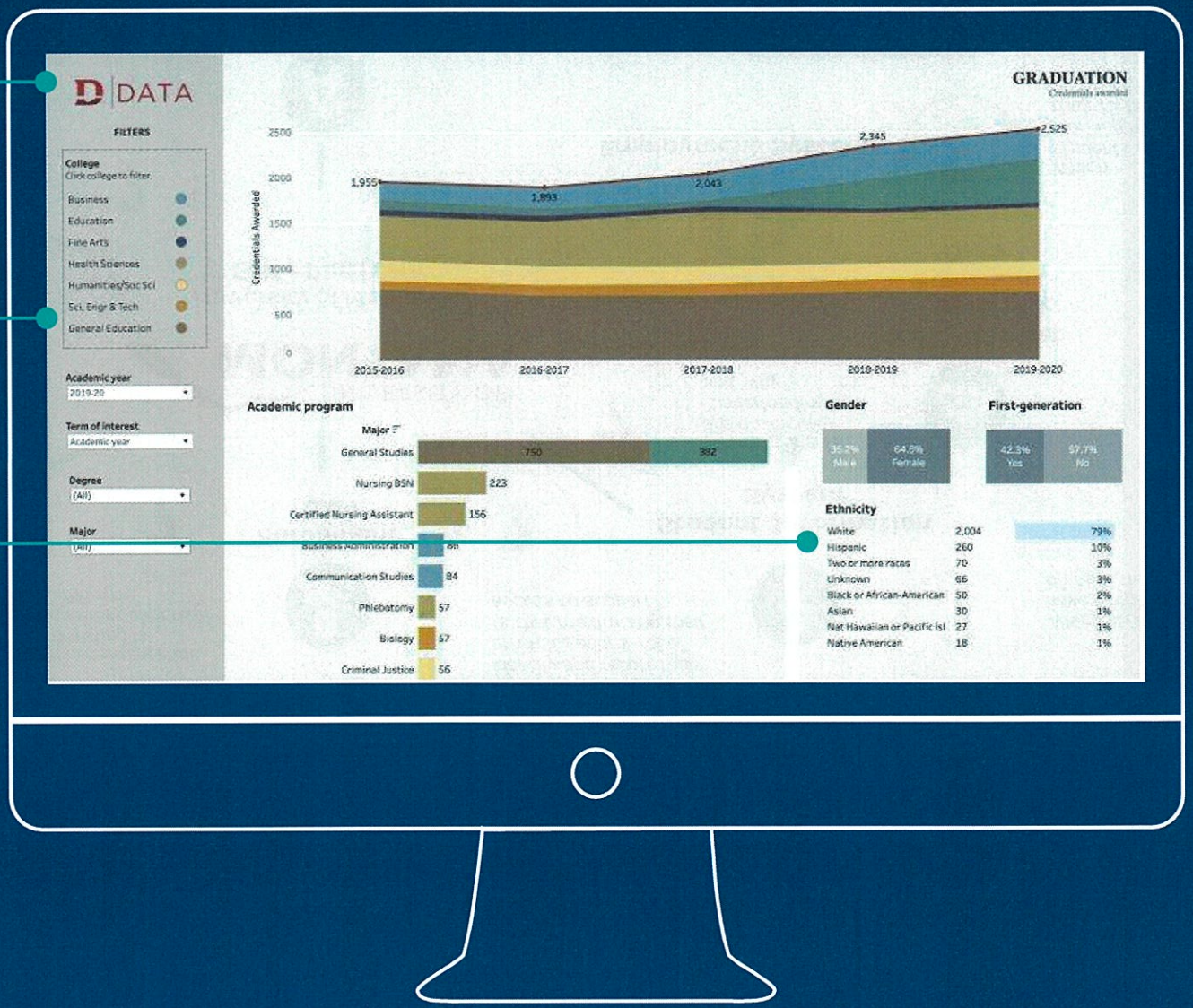
Accelerating Speed-to-Insight

On Key Campus Initiatives

IR office brands Edify-validated dashboards.

Drillable dashboards empower data exploration.

*"Our **DEI leader** saw this dashboard in progress, **and her level of enthusiasm was amazing**. It was intuitive for her, and we could iterate together."*



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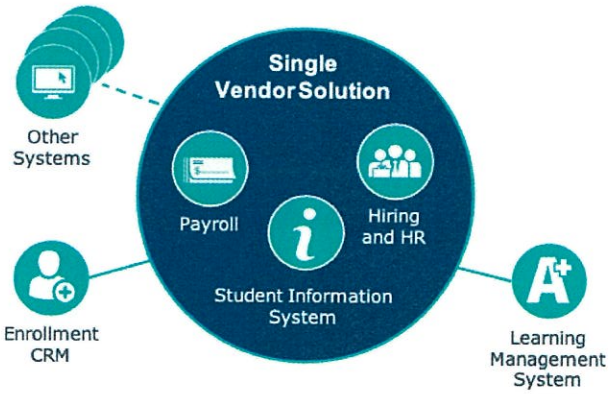
Source: EAB interviews and analysis.

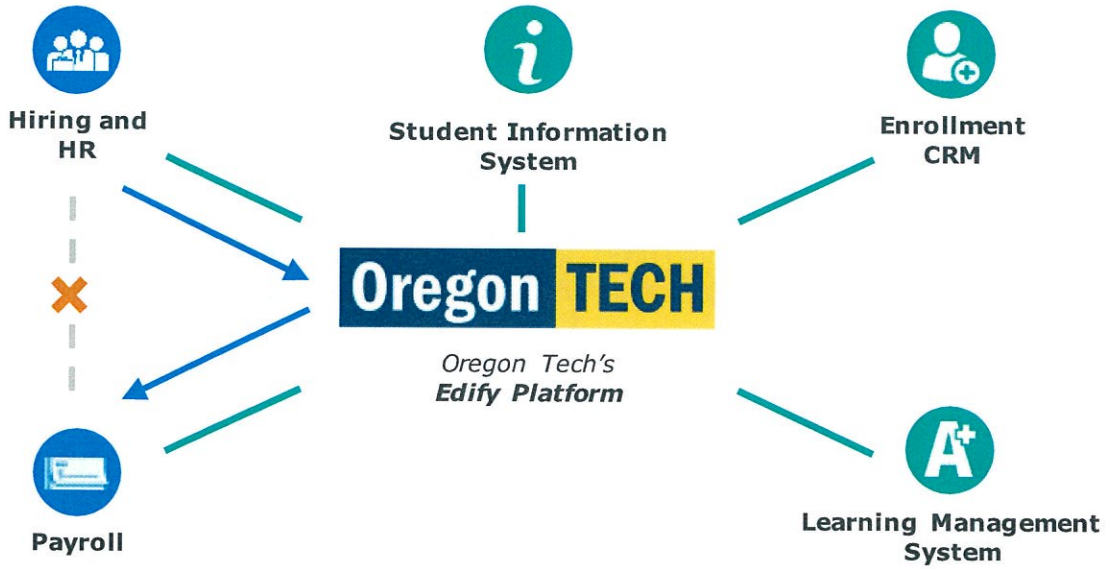
Reallocating IT Spend to Student Success

Expensive Administrative Software Replaced to Free IT Budget

One Integrated Solution



Best-of-Breed Solutions



$115K

Y1 savings from using Edify to support Enterprise Resource Planning (ERP) system replacements

30%

Reduction in spend on annual maintenance of HR and Payroll tech solutions (license and staffing)

$750K+

Projected IT spend reallocations to student-centric technologies across 5-year Edify partnership

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Source: EAB interviews and analysis.

Find Opportunities: Transformation Varies In Scope

Digital Change Determined by Size, Nature of Problems Identified

Spectrum of Opportunity

One-On-One Conversations

Dedicate staff to find problems on campus with a common solution. This can be as small as AWS buttons

Student Journey Mapping

Document student touchpoints with the institution to determine barriers in their journeys

Campus-Wide Digital Strategy

Create a strategic approach to digital transformation that includes a shared vision and plan for the institution

Local, Departmental Change → **Institution-Wide Change**

Coordination Key at any Scale

Strategy

Further the central mission of the institution through digital projects

Investments

Regulate spending to minimize duplication, redundancies

Sequencing

Prioritize early projects that serve as building blocks for innovation

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Source: EAB interviews and analysis.

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Open Q&A

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