Agenda

Institutional and Technology Change Management
• S. Malisch, J. Sibenaller

Student Experience & External Partner Technology Planning
• Enterprise Mentoring Platform – S. Malisch
• Enterprise CRM Platform – S. Malisch

Data Integrity
• J. Apa, J. Sibenaller, S. Malisch
## ITS Major Initiatives FY21-Q3-Q4

### Academic and Faculty Support
- LOCUS Enhancements (8)
- Customer Relationship Management System Evaluation for SON
- Faculty Review/Administration Solution (Interfolio) (7)
- Implementation of Paper Transcript Request Process
- Stritch School of Medicine Portfolio (14)
- Review and Evaluate Proposed Research Administration Solutions

### Administrative Initiatives
- COVID-19 Related Projects (8)
- Lawson/Kronos Enhancements (3)
- Advancement/Development (3)
- Space and Asset Mgmt System - Phase II
- Web Content Upgrade (T4 Sitemanager)
- Automate HSC parking/ID processes
- Conf. Services RFP – (Kinetic Replacement)
- QSB Virtual Event Platform Evaluation
- Replacement of ECSI SALNet (Flywire)
- Community Engagement (Collaboratory)

### Student Technology Support
- EAB Navigate Phase II
- LOCUS Fluid Deployment
- Enhancement to the Alumni Load Process (PeopleGrove)
- Enterprise Learning Hub – Phases 2 & 3

### Infrastructure
- Campus Construction Initiatives (9)
- Information Security Program (8)
- IT Disaster Recovery (6)
- LDE Foundation: Collaboration and Security (7)
- Replacement of LUC's Storage Area Network

### Continuous Service Development
- Business Intelligence/Data Warehouse (7)
- Enterprise Content Management (4)
- LDE Transformation: Digital Assistant/Chatbots (8)
- Learning Analytics - Phase 3
- Travel Mgmt. Services (Egencia) (2)
- Ticketing System – (Neulion/Vendini Replacement) (2)

### Research Computing Services
- Natural Language Processing (NLP) to Enhance Computable Phenotyping
- HashMap technology to support high-performance NLP
- PCORI CAPriCORN 2020 Refresh
- Observational Medical Outcomes Partnership (OMOP) Data Mapping for CTSA/ITM
- Document Process for Charging Resources to Grants
- External REDCap 3rd Party Access
# Institutional and Technology Change Management

**ITS Major Initiatives Calendar FY21 Q2-Q3-Q4**

<table>
<thead>
<tr>
<th>Dept</th>
<th>PM</th>
<th>Project</th>
<th>Go Live</th>
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**Horizontal Bar Chart:**

- Dates: 01/02, 01/09, 01/16, 01/23, 01/30, 02/06, 02/13, 02/20, 02/27, 03/06, 03/13, 03/20, 03/27, 04/03

- Categories: Go Live, Audience, Count
# Institutional and Technology Change Management

## ITS Major Initiatives Calendar FY21 Q2-Q3-Q4

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<thead>
<tr>
<th>Dept</th>
<th>PM</th>
<th>Project</th>
<th>Go Live</th>
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FY20 Application and Integration Changes...
Institutional and Technology Change Management

2020 Enterprise Application Relationship Diagram

116 Enterprise Applications
- 61 LUC Data Center
- 55 Cloud

240-250 Interfaces
- 7-10 Manual
- 45-50 Semi-automated
- 190-200 Fully-automated

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Agenda

Institutional and Technology Change Management
  • S. Malisch, J. Sibenaller

Student Experience & External Partner Technology Planning
  • Enterprise Mentoring Platform – S. Malisch
  • Enterprise CRM Platform – S. Malisch

Data Integrity
  • J. Apa, J. Sibenaller, S. Malisch
### Higher Education is Investing in CX and CRM

#### Changes in Technology Investments

<table>
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<th>Category</th>
<th>Percentage of respondents decreasing investment</th>
<th>Percentage of respondents increasing investment</th>
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<td>Cyber/information security</td>
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<td>Business intelligence/data analytics</td>
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<td>Customer/user experience</td>
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<td>Mobile applications</td>
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**n = 110 Higher Education**

Q. What are the technology areas where your enterprise will be spending the largest amount of new or additional funding in 2021 compared with 2020?

**n = 95 Higher Education**

Q. What are the technology areas where your enterprise will be reducing funding by the highest amount in 2021 compared to 2020?

Source: 2021 Gartner CIO Survey

Showing technologies with at least 10% of Higher Education respondents reporting plans to increase spending.

ID: 722433
Technologies Enabling Improved Student Experience

- Enterprise Class CRM Platforms
- Purpose Built Tools for Recruit, Engagement & Advancement

Emerging Technologies

- Web
- AI
- Mobile
- Analytics
- Chatbot

Data
- Data Hubs
- Master Data Management
- Customer Data Platforms
Student Experience Objectives

Physical

Easy

• Frictionless
• Uncomplicated

Cognitive

Relevant

• Personalized
• Custom
• Satisfying

Emotional

Belonging

• Engaged
• Affinity
• "Promoters"
Recommendations

- Develop a deep and detailed knowledge of the challenges facing your students.
- Ensure your student experience team contains a broad cross-section of stakeholders including Voice-of-the-Student.
- Move progressively from a shallower to deeper understanding of personalization maturing your focus from making the experience “easy” to making it “relevant”.
- Use data, CRM and emerging technologies such as AI and chatbots to power personalization in incremental and scalable ways.
Mentoring Platform - PeopleGrove

• QSB launched a pilot for the Loyola Mentors program using PeopleGrove in Spring 2020

• The top 3 goals developed by the QSB implementation team were:
  1. Scale Business Readiness Mentorship (both for the formal program connected to BSAD 220 sections and generally for all Quinlan students)
  2. Achieve higher quality Flash (1-time) connections for both students and alumni
  3. Engage with Alumni & Friends of the University by building a community where they can connect and contribute in real ways to each other and students
Dashboard (a.k.a. Home)
Student landing page upon login. It provides quick access to recommended connections, profile information, established connections, etc.

Explore the Community
• This tab is where students can explore to find more possible connections
• Searches can be performed and Filters can be added to narrow the view
• Real-time chats can be established within the platform. Those currently online are marked with a green dot
Metrics

Total Users: 941
Total number of users who have ever completed a survey as of Feb 19, 2021.

2,599 messages sent by users, with the following breakdown:
- 437 users with connections
- 46.4% of users with a connection
- 32 users would recommend the service

Overall Breakdown:
- 4.69 avg. star rating
- 51 total submitted feedback

Other details include:
- Total message threads: 448
- Response rate: 46.4%
- Total submitted answers: 32

PeopleGrove
Mentoring Platform - PeopleGrove

• ITS has coordinated demos for several interested schools and departments:
  o SSOM – Nov 2019
  o Arrupe College – Dec 2019
  o School of Law – Feb 2020
  o School of Nursing and Parkinson School – Dec 2020
  o Human Resources (Anti-Racism Initiative) – Dec 2020
  o SSOM – Stritch Peer Support Network (SPSN) – Feb 2021

• Recommendation: Adopt PeopleGrove as enterprise mentoring platform across Loyola
  o Offers consistent experience for mentors, mentees
  o Creates single platform with which the University can capture, share, and report on participation and engagement
    ➢ Increases likelihood of data standardization and data model interpreted in similar ways
    ➢ Simplifies integrations – APIs for Handshake, Zoom and Salesforce through GroveConnect
  o Optimized investment; avoid unnecessary variety and duplication

• Cost
  o Plan for FY22 budget placeholder
  o Needs to be structured with incentive for schools/units to participate
• QSB adopted Salesforce Lightning Sales Cloud in the Business Leadership Hub to manage relationships and to engage partners

• The Centers that have licensed users are the following:
  • Baumhart Center
  • Family Business Center
  • Executive and Professional Education Center
  • Loyola Limited
  • Supply and Value Chain Center

• Over 5,000 contacts in Salesforce
CRM Platform - Salesforce

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  • Loyola Limited
  • Supply and Value Chain Center

• Over 5,000 contacts in Salesforce
### CRM Platform - Salesforce

#### CUSTOM EDUCATION PR...

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<th>Evaluating Needs</th>
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<th>QA Proposal</th>
<th>Proposal/Price Quo.</th>
<th>Negotiation/Review</th>
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- **Media Training Center P...**
  Loyola School of Communicati... Prospecting
  7/21/2022

- **Executive Leadership D...**
  Arnie Health Evaluating Needs
  7/31/2020

- **Executive Leadership In...**
  Alliance for Strong Families an... Drafting Proposal
  5/24/2022

- **Data Storytelling**
  Bel Boretti USA Evaluating Needs
  7/31/2020

- **(2) Leadership Programs**
  Alynia Pipeline Drafting Proposal
  6/30/2021

- **Empathetic Leadership**
  Broti America, Inc. Drafting Proposal
  6/30/2021

- **2021 Professional Develop...**
  Bish Creative Display, Inc. Evaluating Needs
  5/31/2021

- **Group 2 Mission and Vi...**
  Cork County Sheriff's Office Proposal/Price Quote
  2/26/2021

- **Bish Creative Display, Inc.**
  Proposal/Price Quote
  3/11/2021

- **Nonprofit Leadership**
  Bixby Seminary Negotiation/Review
  7/31/2020

- **Legacy Institute 2021**
  The Loyola Family Business C... Closed Won
  2/8/2021

- **Online Mini MBA**
  The University of Phoenix Prospecting
  7/31/2020

- **Global Immersion Progr...**
  Catholic University of Uruguay Drafting Proposal
  6/30/2021

- **Workshop: Global Cultu...**
  Lika Microsystems Proposal/Price Quote
  2/28/2021

- **Proposal/Price Quo...**
  Morton Salt Inc.

- **2021 Managers/PM Gr...**
  Cook County Sheriff's Office

- **Integrated Project Management**
  Proposal/Price Quote
  5/20/2021

- **Negotiations Training**
  Blum Solutions Negotiation/Review
  7/31/2020

- **2020 Booster Trainings**
  Cook County Sheriff's Office

- **Client Communication ...**
  Cook County Sheriff's Office

- **SOW Strategic Planning...**
  Cook County Sheriff's Office

- **Sales & Marketing Forec...**
  Constellation Bonds Negotiation/Review
  7/31/2020

- **Trust Advisor Program**
  Northern Trust Closed Won
  12/31/2020
CRM Platform - Salesforce
CRM Platform - Salesforce
The School of Nursing and The Parkinson School are evaluating CRM platforms. ITS has coordinated demos. Salesforce meets most needs but price points may be too high if schools are left to fund independently. Alternative funding models should be considered.

**Recommendation**: Explore and validate opportunity to adopt Salesforce as enterprise CRM platform available to schools and units across Loyola

- Offers consistent experience and allows us to develop expertise in our use
- Creates single platform with which the University can capture, share, and report on participation and engagement
  - Increases likelihood of data standardization and data model interpreted in similar ways
  - Simplifies integrations
- Optimized investment; avoid unnecessary variety and duplication
- Has potential to mature into a “Student Engagement Hub”

**Cost**

- Plan for FY22 budget placeholder
- Needs to be structured with incentive for schools/units to participate
Agenda

Institutional and Technology Change Management
• S. Malisch, J. Sibenaller

Student Experience & External Partner Technology Planning
• Enterprise Mentoring Platform – S. Malisch
• Enterprise CRM Platform – S. Malisch

Data Integrity
• J. Apa, J. Sibenaller, S. Malisch
Data Integrity

Current Identity System

- LOCUS / Lawson / NAP
- Oracle Database (LUWare)
- Identity Management (IDM) / Directory Services (Active Directory)

Application Data

- LUWare
- Active Directory
- Loyola Web Directory
Data Integrity

System Review

• Internal ITS Review

• Findings fell into three distinct categories
  • **Sources of Data**: Having various sources of data is not uncommon. Lacking a consistent source of truth can cause issues.
  • **Data Inconsistencies**: Data is not always represented accurately across all systems. Data updates and edits are inconsistent or manual.
  • **Conflicting/Complex Business Rules**: Business rules that were created when IDM was first implemented may no longer apply or need to be revisited.
Data Integrity

Sources of Data:
- **Multiple Sources** – Conflicts
- **Lack of Updates** – Lawson to Locus
- **NAP for Employees** – JFRC, Faculty Admin

Data Inconsistencies:
- **Lack of Consistent Sources** – LUWare, Active Directory, Web Directory
- **Missing / Stale Data** – Campus Location, Office Location, Manager
- **Attribute Repurposing** – Employee Status

Conflicting/Complex Business Rules:
- **Roles** – High Role Designates Primary Status
- **Redundant Attributes** – Not Updated/Used
- **Application Processes** – Differing Data Collected
## Data Integrity - Examples

<table>
<thead>
<tr>
<th>Data Component/Category</th>
<th>Impact Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorrect/missing local-home address, supplemental address</td>
<td>Mailings, SHIELD Roster</td>
</tr>
<tr>
<td>Incorrect/missing emergency contact info</td>
<td>Situational</td>
</tr>
<tr>
<td>Incorrect/missing alternate-personal email address</td>
<td>Training follow-up</td>
</tr>
<tr>
<td>Incorrect/missing cell phone numbers</td>
<td>Contact, SHIELD Roster</td>
</tr>
<tr>
<td>Department/location mismatch</td>
<td>Training follow-up</td>
</tr>
<tr>
<td>Duplicate LIDs</td>
<td>Processing; Breaks workflow</td>
</tr>
<tr>
<td>Incorrect/outdated department/division names</td>
<td>Processing, Training follow-up</td>
</tr>
<tr>
<td>Incorrect/outdated supervisor hierarchy</td>
<td>Processing, Training follow-up</td>
</tr>
<tr>
<td>High Role inconsistencies</td>
<td>Processing, Assignments</td>
</tr>
<tr>
<td>Highest degree, preferred degree tracking and assignment</td>
<td>Processing; Breaks workflow</td>
</tr>
<tr>
<td>Faculty data</td>
<td>Processing; Breaks workflow</td>
</tr>
<tr>
<td>faculty attributes, status, track, rank</td>
<td></td>
</tr>
<tr>
<td>part time versus adjunct versus full time</td>
<td></td>
</tr>
<tr>
<td>source of truth</td>
<td>Processing; Breaks workflow</td>
</tr>
<tr>
<td>Grant information, difficulty tracking attributes across platforms</td>
<td>Processing; Breaks workflow</td>
</tr>
</tbody>
</table>
# HI Role

**SHIELD Compliance Testing Dashboard**

<table>
<thead>
<tr>
<th>Classification</th>
<th>HI_Role</th>
<th>Week starting on: 02/14/2021</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(8)</td>
<td></td>
</tr>
<tr>
<td>FACULTY/STAFF</td>
<td>CONTRACTOR</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td></td>
<td>EMERITUS</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>FACULTY</td>
<td>222</td>
<td>222</td>
</tr>
<tr>
<td></td>
<td>JESUIT</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>SPONSORED_GUEST</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>STAFF</td>
<td>562</td>
<td>562</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>816</strong></td>
<td><strong>816</strong></td>
</tr>
<tr>
<td>STUDENT</td>
<td>ENROLLED_STUDENT</td>
<td>4,124</td>
<td>4,124</td>
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<tr>
<td></td>
<td>STUDENT_WORKER</td>
<td>1,003</td>
<td>1,003</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>5,127</strong></td>
<td><strong>5,127</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>5,970</strong></td>
<td><strong>5,970</strong></td>
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</table>
SHIELD Compliance Testing Dashboard

<table>
<thead>
<tr>
<th>Classification</th>
<th>HI_Role</th>
<th>Dept</th>
<th>Week starting on: 02/14/2021 (8)</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>FACULTY/STAFF</td>
<td>CONTRACTOR</td>
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<td>27</td>
<td>27</td>
</tr>
<tr>
<td></td>
<td>EMERITUS</td>
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<td>14</td>
<td>14</td>
</tr>
<tr>
<td></td>
<td>FACULTY</td>
<td>60</td>
<td>60</td>
<td>60</td>
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</table>

- Anthropology: 2
- Applied Health Sciences: 2
- Arrupe College: 3
- Biology: 19
- Cancer Biology: 7
- Chemistry & Biochemistry: 9
- Classical Studies: 2
- Classics Studies: 6

LOYOLA UNIVERSITY CHICAGO
Department/Location Mismatch

**Lawson – Department**
*Human Resources: Sys & Process*

**Web Directory**
*Human Resources: Sys & Process*
Department/Location Mismatch

ISM – Department
Human Resources: Compensation
Some Stats from the BI team

<table>
<thead>
<tr>
<th>HI_Role</th>
<th>No LAWSON Birthdate</th>
<th>No LOCUS Birthdate</th>
<th>Birthday mismatch between IDM3/LUWARE and LAWSON</th>
<th>No Gender in LAWSON</th>
<th>No Gender in LOCUS</th>
<th>Gender mismatch between LAWSON and LOCUS</th>
<th>No LAWSON Address</th>
<th>No LOCUS local or permanent/home address</th>
<th>No LAWSON home phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>STUDENT_WORKER</td>
<td>-</td>
<td>-</td>
<td>23</td>
<td>6</td>
<td>-</td>
<td>18</td>
<td>-</td>
<td>-</td>
<td>12</td>
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<tr>
<td>FACULTY</td>
<td>-</td>
<td>224</td>
<td>52</td>
<td>2</td>
<td>-</td>
<td>17</td>
<td>-</td>
<td>1,642</td>
<td>63</td>
</tr>
<tr>
<td>STAFF</td>
<td>-</td>
<td>189</td>
<td>41</td>
<td>20</td>
<td>11</td>
<td>8</td>
<td>-</td>
<td>1,101</td>
<td>93</td>
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<tr>
<td>NONE</td>
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<td>1</td>
<td>-</td>
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<tr>
<td></td>
<td>-</td>
<td>414</td>
<td>116</td>
<td>28</td>
<td>12</td>
<td>43</td>
<td>-</td>
<td>2,744</td>
<td>168</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Students enrolled Term</th>
<th>No LOCUS phone</th>
<th>Students with International Perm address who are enrolled in on-campus classes and do not have a local address within 50 miles of LUC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring 2021</td>
<td>35</td>
<td>42</td>
</tr>
<tr>
<td>Summer 2021</td>
<td>11</td>
<td>0</td>
</tr>
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<td></td>
<td>46</td>
<td>42</td>
</tr>
</tbody>
</table>
Data Integrity Recommendations

• Confirm leadership commitment to make data integrity, data cleanup and data governance a priority project
  o Focused on One Loyola vision and increased integrations across systems and campuses
  o Needed for success of larger enterprise changes

• ITS will champion and provide Project Management support; close partnership with OIE; engage units as appropriate
  o Not just technology, work to be done in the units
  o Current efforts to support project by project is not sustainable/cost effective
  o Repurpose Role in BI
2021 ITESC Schedule

February 25, 2021 - Thursday, 10:00 AM-12:00 PM
- Institutional and Technology Change Management
- Student Experience & External Partner Technology Planning
- Data Integrity

April 22, 2021 - Thursday, 10:00 AM-12:00 PM
- TBD

June 17, 2021 - Thursday, 10:00 AM-12:00 PM
- Project Portfolio Prioritization

August 12, 2021 - Thursday, 10:00 AM-12:00 PM
- Start of School Update
- TBD

October 21, 2021 - Thursday, 10:00 AM-12:00 PM
- TBD

December 14, 2021 - Tuesday, 10:00 AM-12:00 PM
- Project Portfolio Prioritization