



Attendees:

Area	Name	Attended/Absent	Area	Name	Attended/Absent
Advancement	Karen Paciero	Attended	Provost Office Representatives	David Slavsky	Attended
Enrollment Management & Student Success	Paul Roberts	Attended	HR	Winifred Williams Danielle Hanson	Attended Attended
Facilities	Kana Henning	Attended	ITS/Facilitator	Susan Malisch	Attended
Finance	Wayne Magdziarz Teresa Krafcsin	Attended Attended	ITS	Jim Sibenaller Jeff Apa	Attended Attended
President's Office	Tom Kelly	Attended	Student Development	Jane Neufeld	Attended
Provost	Norberto Grzywacz	Absent	UMC	Jeremy Langford	Attended
Executive Vice Provost	Sheila McMullan	Attended	School of Nursing	Lorna Finnegan	Attended

Welcome, Meeting Purpose & Agenda

The minutes from the December 8th meeting were approved as written. The agenda for February 25th includes a discussion on Institutional and Technology Change Management, Student Experience and External Partner Technology where the group will discuss options for an Enterprise Mentoring Platform and for an Enterprise CRM Platform and finally, a discussion on Data Integrity.

Institutional and Technology Change Management – S. Malisch & J. Sibenaller

Susan introduced the change management calendar view to the steering committee. The calendar captures what technology changes are being made, on what dates as well as who is being affected by these changes. It is important that ITS keeps these changes organized to avoid any challenges with overlapping go-lives or overwhelming any one group of users with change within the university. Susan and Jim walked through ten major initiatives and the changes ITS would have to manage when one app is replaced or altered. Some of the major initiatives discussed included FARS (Faculty Administration Re-Architecture Strategy), LOCUS, SSOM Admissions Replacement and Finance / HR ERP Replacement. As Susan and Jim walked through each of these major initiatives, they highlighted the interfaces and other applications that would be affected by just one change. They emphasized the amount of testing and re-testing that goes into replacing an application is not insignificant. Each lime green line represents one or more interfaces connecting the applications.

Discussion followed regarding the amount of technology change the faculty and staff have gone through recently. Susan reassured the steering committee that ITS is aware of the amount of change happening, some of the technology changes are necessary due to vendor requirements, some are also directly related to COVID-19 and the move to remote work. Many faculty, staff and students have had to learn new technology to adjust to the remote work. The change calendar helps ITS understand the changes being made and helps ITS be more thoughtful of how many changes are happening at once. Jim reassured the group that ITS assesses the enterprise effect of each new potential technology. If there is an opportunity to use the larger package and minimize the amount of applications, then that is taken into consideration.

Student Experience & External Partner Technology Planning – S. Malisch

Susan re-introduced the idea of moving towards a more holistic student experience and what that means for ITS. As previously mentioned, it is important to manage the lifetime of the student, from beginning to end. A major part of managing the student body experience from recruitment and enrollment through alumni relations and advancement is the role of data and CRM platforms.

Enterprise Mentoring Platform – S. Malisch

Susan explained that the Quinlan School of Business launched a pilot for PeopleGrove, a mentoring program Quinlan was committed to growing within QSB. With QSB piloting this program, it was discussed that if the pilot went well, PeopleGrove could be considered for an enterprise-wide platform at Loyola University Chicago. There has already been a number of schools and units within Loyola that have demo'd the platform with PeopleGrove. It is the intention of ITS to have one enterprise-wide mentoring platform, to optimize our investment. If we move forward with a larger package that schools and units could cost-share, it would incentivize schools and units to participate and create a better opportunity for better information sharing and integration. A discussion followed regarding how this project might fit in with the other major initiatives, Susan reassured the group that we have already built out a lot of the necessary technology for PeopleGrove because of the ongoing pilot with QSB, and the fact that it is a cloud based solution, so requires much less heavy lifting. Having access to PeopleGrove would lay the foundation for a mentoring program, but there is still work to be done in building out the program and there would need to be an internal person to spearhead the effort. The group agreed it would be helpful to hear from Dean Kevin Stevens on the implementation of PeopleGrove and some feedback from the pilot stage at a Council of Deans meeting.

Enterprise CRM Platform – S. Malisch

Similar to the need for an enterprise mentoring platform, ITS has also felt a growing need for an enterprise CRM platform.



There are a number of schools that have expressed interest in a CRM platform, and so far Salesforce looks to be a good option. Susan opened the conversation to the group to explore the requirements across the university for a CRM platform. Paul mentioned Slate as a good option, it is able to manage all the contacts for recruitment including undergrad and graduate programs, as well as has an advancement model. Sheila explained that Georgetown used both Slate and Salesforce. Salesforce was not a viable option for admissions- they had to rely on an external person to build out the platform, but Salesforce was chosen for alumni in Advancement. Susan explained that if we went the enterprise-wide route, an RFP would be needed, taking roughly 18 months. Susan emphasized that ITS is already doing work on CRMs for different units and schools, so she is looking to consolidate these efforts. If ITS can offer one CRM, it saves the trouble of going through the process multiple times and ending up with multiple different platforms. ITS wants to express that there is a need in schools for a better way to capture and manage these relationships, and there might be an opportunity to offer one platform enterprise-wide. Sheila, Lorna, Jim and Susan will meet to discuss and identify the next steps of approach.

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

Jeff gave an overview of Loyola's current identity system. When we want to move forward and use more sophisticated technology, we find we have various sources and a lack of consistent source of truth, which ultimately causes issues with our data. Following an internal ITS review, findings fell into three distinct categories: sources of data, data inconsistencies and conflicting/complex business rules. All of these combined, leads to an abundance of missing and incorrect data. Jim ran through some examples ITS has come across, a few of those being: out of state/city addresses for students COVID-19 testing on campus, incorrect HI role, no department listed, or incorrect department listed. These issues are seen regularly and cause difficulties when it comes to exporting data. David explained some of the complications he has come across with the data. One of the main issues is the recycling of PCNs (Position Control Numbers), when a PCN is recycled but the data is not updated, it causes many issues that need to be corrected by hand to obtain the correct data. Susan requested verbal confirmation from each ITESC member that they are committed to working on this issue. Each area gave verbal confirmation they are committed to support and begin working on this effort. ITS will take some time to organize their approach, identify the participants and begin to reach out to other units as needed.

Next meeting – Thursday, April 22, 2021 – 10:00am -12:00pm –Via Zoom tele/video conference.

Respectfully submitted,
Megan Youngs