UNM IT Research Technologies Advisory Board
Wednesday, July 24, 2019
Scholes Hall, Roberts Room
1:00 pm – 2:30 pm

Chair: Patrick Bridges

Attendees: Karl Benedict, Sylvia Celedon-Pattichis, Renia Ehrenfeucht, Mark Emmons,Jonathan Wheeler, Elisha Allen, Duane Arruti, Grace Faustino, Trish Henning, Brian Pietrewicz

Support: D. Markham

Topics

1. Approval of Minutes (May 22, 2019 minutes approved without corrections.)

2. Project Outages, Data Center – Network, August and UPS, December (Brian)
   Brian confirmed e-mails have been sent for the August outage and asked if anyone had questions. He requested committee members assist with ensuring the communications are disseminated as needed in their areas. They are in the process of identifying potential dates for a December outage. Duane advised that IT is developing a communications plan for significant events and would appreciate any input if the current approach needs adjustment. Karl requested additional, more technical information be provided to the managers of co-located systems that will be affected by an outage; he suggested these groups be engaged earlier in IT’s planning process. This would allow those areas additional time for planning how the outage will affect their operations. The current communication is good for service users but is not as useful for technical partners managing impacted systems. Brian agreed there is a need for two waves of communications, one for technical users and one for service users. He is working with Deirdre and the project management team to identify the best approach for engaging technical users earlier in the process and identifying how this would impact communications. This work is being coordinated with the change management group (CAB) so planning, approval, and communications processes are aligned and consistent.

3. Informational Items:
   a. Update on Site Licensing (SPSS, Qualtrics, NVIVO, RStudio) (Grace)
      i. Grace and Kirsten met with Gartner analysts to review their analysis of software packages. Grace will debrief with Kirsten next week.

      **Action Item:** Grace will invite Kirsten to the next meeting to provide an overview of the Gartner analysis relative to the identified software packages and existing licenses.

   b. Working Group Updates (Chris, Karl, Mark, Edl)
      i. Intake – Patrick advised they are developing a score card. When the final draft is completed, they will use software such as SPSS and Qualtrics to assess the usefulness of the score card.
**Action Item:** When the scoring committee has approved the draft, Patrick will circulate to this committee for input.

ii. **Infrastructure** - Mark advised minimal input has been received from the first survey. Mark has contacted directors and ADR’s directly and would like input in early Fall. It will be more useful to have good quality feedback rather than adhering to the original deadline. Sylvia asked if other software packages could be included. Grace advised that information about packages other than SPSS, Qualtrics, NVivo, and RStudio could be included. Gartner suggested in addition to identifying the specific package that is preferred, it is useful to ask faculty to specify why they selected a certain package, what are the specific tools they find beneficial, and what features best support their research. This will help identify a suite of tools that meet most faculty member’s needs.

iii. **Research Data Management** - Karl advised the group has discussed a use case approach for the 4 top level focus areas - project and data management, planning/infrastructure, training and policy. Based on a review of projects submitted over the last 8 years, well-written data management plans identify 80% of what is needed. Additional research context may not be included in the plans but can be gathered. The information from existing plans is useful to understand the types of data, volumes of data, tools of data, how they will manage and share data, workflow, and how they document, preserve, and share data.

Karl confirmed the plans they are assessing are tied to specific research proposals. The information is helpful for identifying what institutional capabilities are needed to plan for and manage research needs. This will guide identifying gaps in the 4 focus areas, what is needed relative to capacity, policies, procedures and training. Longer-term, this information could be used to provide standardized language for proposals. Jon suggested that ERB protocols could provide similar information.

**Action Item:** Committee members were asked to provide Karl any data management plans they would like included in the committee’s assessment.

**Action Item:** Karl will include evaluation of ERB protocols in the committee’s assessment.

iv. **Electronic Data Management** – After meeting with Rosa from Office of Sponsored Projects (OSP) to discuss options, Patrick and Edl will propose that a group of faculty work with Rosa to provide assessment of electronic research administration needs. They will reach out to HSC who has recently completed a similar needs assessment. Deans will be asked to identify faculty and ADR’s who can support the gap assessment, provide input on what the needs are, on what works, and on what doesn’t.

v. **New Item:** Trish advised the National Council of University Research Administrators (NCURA) review will begin in November. This will include a review of research administration, OSP, OVPR, compliance, etc. by peers from other universities and provide information about UNM’s processes. Patrick agreed faculty input for the review will be useful. Trish confirmed that the information
NCURA collects through their survey will be available to committee members as needed to align with information that has been or will be collected.

**Action Item:** Karl will connect Trish with a group in the Virgin Islands who just completed this review.

vi. Strategic Planning – Patrick advised that Chris and Kirsten are identifying current campus-wide research spending.

vii. Budgets – Patrick advised he and Duane are working on an advisory board funding proposal.

c. Research Service Catalog Prototype (Grace)
Grace demonstrated the Research Technology Service Catalog prototype. It was developed with assistance from many of this committee’s members and is based on the Educause model. Currently, it includes information from the Libraries, Anderson, EDAC and A&S. Information and input from COE, CARC, CFA, Architecture and Engineering services will be added when received.

It is intended to be a meta-data collection that provides information about services faculty can access. Further assessment is needed to determine how to operationalize ongoing support and tie it into the Help Desks for IT, CARC, and the Libraries. Currently, the request is tied to the unit/department/school who manages the service. Grace demonstrated different areas populated in the prototype. Karl asked if customized language could be added to clarify service levels for specific services. Jon said the committee has discussed how to fulfill the goal for the catalog as a broad-level reference guide and balance inclusion of specific service level information within areas. Another area under discussion is management of unsupported services. These are services a faculty member can install, but they are not supported either within the unit or centrally beyond installation. One option would be to have a user group approach for these services.

**Action Item:** Grace and Jon will incorporate feedback received at today’s meeting. As the prototype is updated, they will review the next iteration with this committee.

d. Proposed Intake Process Discussion (Patrick)
Patrick advised the catalog will easily let faculty identify services that are already available. Requests will be made only if a service is not available. Cherwell may be used for managing requests. Grace will work with the operational committee to determine if a request should be escalated. Outstanding items for managing the process include that there is not currently a way to identify if faculty find the service they are looking for. There also isn’t a way to track if the service they select meets their needs.

Duane advised there is a project to upgrade to the latest version of Cherwell. Input from IT Officers will be incorporated for the upgrade. Duane suggested Grace also participate to identify how Cherwell could be used for service requests. Patrick advised there will be a communications process to educate faculty about the catalog. A final issue to address is
how to keep the catalog up-to-date since content comes from many groups and can be expected to change regularly.

e. New Item – Committee Membership and Chair for 2019/2020

**Action Item:** Patrick asked that committee members send updates for membership to Patrick and Deirdre.

**Action Item:** A new chair will need to be elected at the August meeting.

Adjourned 1:50.

**Next Meeting:** *August 28, 2019 1-2:30 pm Scholes Hall, Roberts Room*