UNM IT Research Technologies Advisory Board
Wednesday, May 20, 2020
Zoom Meeting
9:00 am – 10:00 am

Chair: Patrick Bridges
Attendees: Karl Benedict, Tito Busani, Sylvia Celedon-Pattichis, Mark Emmons, Laura Putz, Edl Schamiloglu, Robert Rhatigan, Mark Servilla, Mary Tsiongas, Elisha Allen, Duane Arruti, Grace Faustino, Jeff Gassaway, Linda Johansen, Brian Pietrewicz, Alexander Webb

Guest Presenters:

Notes: Deirdre Markham
1. Approval of Minutes (April 2020 minutes approved)
2. Action Item Follow-up
   a. Update on the Electronic Research Evaluation Committee (Edl Schamiloglu, Chair)
      At the April 22nd meeting, the committee discussed the pros/cons of Cayuse relative to the requirement list. A subcommittee of the group will schedule a meeting in June with Cayuse to review this information. Stacy with HSC will provide the committee a review of Click on May 27th.
   b. Update on current Mathematica License based on Academic Tech Survey (Grace/Patrick/Elisha)
      Academic Technologies had sent a survey to students and faculty to identify which software titles that had been accessed through the computer labs were most needed during remote operations. Elisha reviewed the results which did not identify clear standouts. For Mathematica, 4 selected it as “critical”, 4 selected as “nice to have” and 21 selected it as “not needed”. This survey and a new request process through help.unm.edu will be used to identify what to include in the new LoboDesktop (Windows Virtual Desktop). Brian advised the go-live date is May 28th pending confirmation with Duane on initial funding. Elisha sees Mathematica as a good option to include in VDI; there are pockets of need so floating licenses rather than an enterprise license should meet those needs. At this time, there isn’t enough broadly identified need to warrant the cost of an enterprise license for Mathematica.

Sylvia asked if Qualtrics was included in the survey. Elisha advised it wasn’t since it currently isn’t offered through the computer labs. Patrick agreed it would be good to consider the inclusion of Qualtrics through VDI but funding for Qualtrics continues to be a concern. Sylvia asked about options for qualitative researchers who need access to Qualtrics. COE has purchased these licenses, but access is an issue. Duane discussed that the initial focus was for titles used in computer labs that are available through existing license agreements. Moving existing licenses to VDI generally adds only the additional cost of VDI.

Brian discussed concurrent licensing which is not available for all software. There is named and shared licensing which allows you to load the shared license to VDI as you would to a computer lab. Sometimes site licenses include some shared licenses. Patrick sees opportunities to identify a broader range of software package licenses that could be used through VDI rather than purchasing campus-wide site licenses.
which are often cost prohibitive. Simultaneous usage averages 50-100 users for most packages. Duane asked Brian to confirm that specific users can be assigned to a license. If Qualtrics offers a concurrent license, a group of researchers could be in a pool that uses the concurrent license. Brian advised this can be done. His team is currently evaluating an average cost for different licenses based on how applications are used and the associated storage costs.

Given the interest in Qualtrics this committee previously identified, Grace asked if the committee should work with COE to develop a proof of concept for VDI use of Qualtrics. Karl advised they are seeing continued interest in use of Nvivo. Sylvia would like to survey COE faculty on their needs. Elisha will share the survey for Sylvia to distribute. Duane asked if the proof of concept would be to work with COE on an approach to meet their licensing needs through VDI. Access would be for an identified pool of COE users. IT would cover VDI expenses with COE covering the concurrent usage costs. This could be a pilot for other areas that also have limited usage needs for packages such as Qualtrics. Sylvia will discuss this with COE’s new dean. This approach could allow for more cost-effective use of licenses since the number of concurrent users may be low, and it is a good use of VDI to share resources across schools and colleges given expected budget limitations. Brian advised the current process when a software request is sent to the IT Service Desk is for the IT finance group to evaluate if licenses currently exist or would need to be purchased. Purchasing of licenses across units isn’t currently part of that process. If and when COE is ready to consider evaluating using VDI to share Qualtrics licenses, they should put in a request.

3. Informational Items:
   a. Return to Operations Planning (All)
      Patrick asked if there are specific items to discuss regarding return to operations. The initial memo from the VPR office outlines guidelines for reopening research labs.

      Mark advised the libraries are starting a carry-out service for print materials with a once-a-week option for pick-ups.

   b. Headcount Funding Model (Duane)
      During the move to remote instruction and operations, IT has focused on deploying needed services without chargebacks. Supplemental costs for these activities are being tracked, and reimbursements will be requested through the various COVID related funding options. VDI is an example where there are supplemental costs based on the number of users so Duane wanted to revisit the headcount funding model. The model identifies all the different services available on campus and the associated costs based on number of users. The goal is to eliminate the per cost service model and cross-subsidies and move to a true headcount approach where services that are used are paid for based on FTE.

      Duane would like to engage the advisory boards to provide any additional information that is needed to update the model. This would be for the FY21 budget cycle. Kirsten advised they are updating the model with expected enrollments and services that should be included in the model. They are working with the fiscal services offices to propose how to fund IT off the top based on headcount so all units have access to a set of basic services. Duane asked for feedback from this group on
the areas the modeling should focus on to help meet the needs of the research community.

Mark E. sees this as an enterprise approach which may be difficult to apply to research given the unique needs different disciplines have for research. Duane agreed the headcount model focuses on the services that are broadly needed. Specialized services would be procured by individuals, colleges, or schools to use as needed and would not be included in the headcount model. However, for some specialized services, such as was discussed earlier for Qualtrics, there may be opportunities to take advantage of concurrent usage and share costs across areas. IT could help facilitate those opportunities. Patrick said there may be opportunities to evaluate a model for providing sustainable funding for research computing. Duane said this is an opportunity to review services that are no longer needed or could be handled through other options to create efficiencies. Karl commented the scoring model could be used to identify opportunities for institutional investment even if not all of them are for the entire institution. There may be an opportunity to provide and support some specialized services through a portion of the headcount pool.

Edl commented ECE used to encourage faculty to include a line-item in proposals for computing needs. He asked if this should be revisited with OSP to consider including in proposals going forward. Patrick commented this should be discussed with OSP, and guidelines from federal funders can preclude this as an option if it looks like F&A. Another approach could be to negotiate an additional percentage of F&A to support research computing. This would be useful for sponsored funding, but it doesn’t address unsponsored research needs. Duane agreed continued direct funding for research is needed where appropriate. The headcount model shouldn’t take away from that. This committee’s input for both what services are needed and which funding sources provide the most beneficial budget impact should be included in discussions about the headcount model and sustainable funding for research outside of the headcount model. Patrick sees the headcount model as supporting the services that are needed by all students, faculty, and staff which would include some services that support research broadly. The specific research services that will meet broad needs should be identified. Duane asked if one of the subcommittees could assist with identifying those services. Patrick advised this is part of the discussion for item c. For other research needs, additional sustainable funding sources need to be identified. Grace asked if Rosa should come and discuss the options OSP would recommend. Patrick commented this would be a good item for the strategic subcommittee to evaluate and bring back to the full committee.

**Action Item:** The strategic subcommittee will discuss the funding options with OSP and report back to this committee.

c. **Summary Research Maturity Model Assessments (Patrick)**
Most of the findings are completed and within the next week or so, a full summary of each area will be provided to the committee for input. The 3 main take-aways for areas to address are:
- lack of an institutional strategic plan for research computing and data
- lack of a cohesive and sustainable funding model
- need for staffing and staffing support
Patrick recommends a subcommittee be formed to work on these areas. After the group has reviewed the initial findings and provided input, each group will likely put together an executive summary of the findings.

**Action Item:** The findings will be provided to the committee for review.

d. Virtual Desktop Support for Research Computing (Brian/Patrick)
   See above.

4. Decision Items (none):

5. Security Updates (Jeff Gassaway)
   a. Policy Related Issues for Privacy and Security
      Two faculty senate committees are reviewing the draft policy. They will meet again in Fall with a goal of bringing the reviewed policy to this committee in October. Jeff shared the updated “Working with UNM Data” guidelines that are posted on the ISPO site. The guidelines are aligned with Policy 2520 and provide operational guidance for working with data. Policies 2500 and 2520 will reference this document.
   
   b. Security Issues, Emerging and Existing

   c. Security Strategy (none)

6. Open Floor/Announcements
   - Duane advised the finance area is putting out procurement guidelines for areas to use when making purchasing requests during remote operations. IT included a request that any areas with IT purchasing needs go through their IT area representatives or submit the request to IT. This will allow IT purchases across areas to be consolidated so efficiencies can be identified for bulk purchasing. We have a pre-negotiated discount of 30% on Dell equipment; Brian P. commented that through bundling of purchases, they are seeing even larger discounts.
   - Sylvia asked if there is information available on how CARES act funding has been or is being used to support faculty or staff remote work. Patrick advised right now the OVPR office is mostly focusing on return to work issues. Mark advised the libraries are supporting additional expenses for faculty and staff due to remote work; they are tracking these expenditures to submit for reimbursement as further information is provided on additional options for allocating CARES funding.

**Next Meeting:** *June 17, 2020, 9-10:30 am, Zoom*