

MEMORANDUM

TO: Fort Wayne Senate

FROM: Kathy Pollock, Chair
Executive Committee

DATE: October 31, 2016

SUBJ: Subcommittee reports on Action Plan 41

WHEREAS, on September 13, 2016, the Executive Committee of the Fort Wayne Senate charged Senate committees and subcommittees with reviewing and reporting upon the action items contained in "Action Plan 41" associated with USAP Recommendations 2.4, 2.5.4, and 4.3; and

WHEREAS, the subcommittees met subsequently to create written reports (attached) to document due diligence; and

BE IT RESOLVED that the Fort Wayne Senate recognize the attached reports are a clear indication that the charges were met and tasks completed.

Action Plan 41 – Senate Library Subcommittee Report on Recommendation 3.9

The Senate Library Subcommittee was tasked with responding to the following item in Action Plan 41:

III. Invest to Generate Revenue – Invest in retention and student success – Invest in new and expanded programs – Invest so units can excel

3.9 Invest in Helmke Library

Plan 2020 Alignment: I.B.

Action Items:

1. Implement fundraising plan for naming opportunities
2. Increase digital collections holdings
3. Increase number of discipline specific librarians

Responsibility: VCAA/EM, VCFAA

Senate committees and subcommittees were charged with writing up a brief report that does the following:

1. Communicate with the responsible administrators identified in Action Plan 41 to develop an understanding of the administration's timelines and plans for next steps. This information should be included in your report to the Senate.
2. Evaluate the feasibility of the action items associated with each USAP Recommendation proposed by the administration.
3. Make recommendations on how to proceed with each USAP Recommendation. These recommendations can be an endorsement of the administration's proposed action items, timelines, and plans; a proposal to scrap any or all of the proposed action items; a proposal for an entirely new approach to the USAP recommendation; or whatever else the committee feels appropriate to recommend.

1. For 3.9, the administrative timeline and plan (in this case from the Vice Chancellor for Academic Affairs) is as follows:

Priority: Academic Affairs Primary Task

Recommendation: Invest in Helmke Library

Task: Continue to make strategic investments in Helmke

Date: Ongoing

- Action Item 1: Work closely with IPFW Advancement team during the Library and Learning Commons Naming Opportunities fundraising campaign and ongoing fundraising efforts
- Action Item 2 and 3: Meet with VCAA one/month to discuss library needs
- Action Item 2: Prepare budget request according to VCAA process
- Action Item 3: Prepare librarian and staff personnel requests according to VCAA process outlined in [OAA Memorandum 15-3 Guidelines for Faculty Position Requests](#)

2. For 3.9, The Subcommittee notes the following regarding the feasibility of the action items:

Action Item 1: Implement fundraising plan for naming opportunities

- Library and IPFW Advancement have launched the Naming Opportunities Campaign and are already receiving donations through that campaign. This campaign ends December 31, 2016
- **Feasibility:** Ongoing annual campaigns to add to the Library Endowment and the proposed Technology Endowment should be feasible and effective.

Action Item 2: Increase digital collections holdings

- Subscription-based digital collections (e.g., e-journals, e-books, databases)
 - Continued annual zero-based evaluation of serials subscriptions
 - Current annual budget request for serials in the last three budget cycle has been based upon average serials price increases (5-7% in recent years), and
 - Requests by departments for items needed for new programs or expanded programs.
- **Feasibility:** VCAA has been able to increase serials budget by the recommended percentage increase in serials prices (which maintains the current collection). VCAA has not been able to increase budget to add new subscriptions for new programs or expanded programs in the last two budget cycles.

NOTE: Anticipated changes in the IPFW Management agreement that could require a split from the IU Library system to the Purdue library system will be extremely costly (over several million dollars) and will significantly reduce access to research resources for students and faculty.

- Digital collections created by the library (e.g., mDON, Opus, Digital University Archive)
 - mDON: Adding new collections at a very reduced rate, due to lack of staff and funding. Applying for federal grants under the Library Services and Technology Act and developing more partnerships with campus and community groups is a priority.
 - Opus: Continued thoughtful and forward-looking reorganization and training of staff and librarians has made it possible to implement and manage current Opus collections. There remain very few resources for continued growth.
 - Digital University Archive: Addition of one new staff and a small S & E budget for the creation of phase one of a digital university archive.

- **Feasibility:** With the budget shortfall, it may be difficult to appropriate additional funds for digital collections. The top priority is filling the Digital Initiatives Assistant position that has been frozen in order to build the university archives before materials are lost. It is especially important to preserve the university's history as we anticipate undergoing several changes in the near future.

Action Item 3: Increase number of discipline specific librarians

- Due to a retirement the library will be losing its Head of Technical and Information Technology Services in the Spring 2017 semester. This librarian position is mission critical for IPFW. All electronic resources are purchased, linked and maintained by this librarian. The librarian makes sure electronic resources are available on and off-campus, 24-7. The librarian also works with our vendors and our consortia libraries to negotiate the best contracts for our resources. This position must be filled as soon as possible. In addition, anticipated changes in the IPFW Management agreement that could require a split from the IU Library system to the Purdue library system will require a complete change in the library's cataloging, circulation, acquisition, and, public access catalog. Many of these changes will need to be made and managed by the Head of Technical and Information Technology Services. IPFW cannot make a transition of this magnitude without a librarian in this position.
 - University Archives Assistant position that was recently frozen also needs to be filled in order to fulfill our commitment to preserving the history of IPFW. Harvesting and digitizing university documents, photos, and media has slowed considerably due to lack of staff.
 - Depending upon the changes in programs at IPFW, the library has had long-range plans to have three librarians associated with COAS – Science, Social Sciences, and Humanities.
 - The library is also in need of an instructional designer to help with online tutorials and other teaching tools for information literacy.
- **Feasibility:** It is mission critical that we fill the Head of Technical and Information Technology Services position in order to insure access to our e-collections both on- and off-campus and to work with IU, Purdue and other Indiana academic libraries to negotiate subscription contracts favorable to IPFW.

NOTE: Anticipated changes in the IPFW Management agreement that could require a split from the IU Library system to the Purdue library system will require a complete change in the library's cataloging, circulation, acquisition, and, public access catalog. Many of these changes will need to be made and managed by the Head of Technical and Information Technology Services. IPFW cannot make a transition of this magnitude without a librarian in this position.

3. Senate Library Subcommittee Recommendations

The library is in agreement with the USAP recommendations and the administration's proposed action items.

However, impending changes in the IPFW management agreement and relationships with Purdue and IU library systems will inevitably disrupt the current effectiveness and quality of library services. These current action plans will need to be re-addressed when the final results of the IPFW Management Agreement is reached.

Senate Advancement Advisory Subcommittee – Report on Action Plan 41 Recommendations

The Advancement Advisory Subcommittee met on October 19, 2016 at 6pm, where Vice Chancellor Fincannon and Jack Patton gave presentations on the Office's activities as well as its plans and timelines regarding the various items related to the Office's involvement in Action Plan 41.

Our subcommittee was charged with providing recommendations on the following Action Plan 41 items: 3.7, 3.8 (marketing-related aspects) and 2.9 (marketing-related aspects). The committee unanimously found the Office's plans and timelines a reasonable response to the recommendations. Below each bullet point below we include a description of the Office's plans and timelines. With this report, we include the slides from the presentation Vice Chancellor Fincannon gave to us as well as a copy of the website modernization plan, shared with us by Jack Patton.

We are happy to answer any additional questions URPC might have about what our committee learned during our meeting. We are also happy to meet again to provide further recommendation or deliberate over additional items URPC may charge to us.

Respectfully submitted,

Stephen Buttes
Assistant Professor of Spanish and Culture Studies
Chair, Advancement Advisory Subcommittee

3.7 Develop and implement a strategy for increasing endowments, sponsorships, student scholarships, and fundraising at all levels by providing appropriate resources to Advancement, making it a university-wide strategic priority

- Develop deans' initiatives programs for academic fundraising
 - Vice Chancellor Fincannon's office held a workshop in fundraising for the deans in Fall 2016 and plans to continue and improve these initiatives in the coming years.
 - College Advisory Councils are a point of focus for deans' activities in development.
- Establish general scholarship fund
 - No specific information on a general scholarship fund was discussed during our meeting, but 59% of the Office's raised funds (\$6,670,124 in 2016) is marked for student support. A portion of this money is targeted for scholarships. Some scholarships are distributed to students with specific degree programs.
- Set specific fundraising goals with identified projects
 - A featured initiative is the Weitzman Society, which began with a 3 million dollar gift from the Weitzmans. These scholarships go to one education and one engineering student each year, to honor the donors. This project has expanded into the Weitzman Society, which is an initiative focused on planned giving (or, remembering IPFW in a will or estate). The Office has acquired 28 planned gifts through this initiative and has a target of 100 for 2016.
- Implement ongoing professional development for deans and chairs
 - Deans' workshops will be implemented on a regular basis.
 - Vice Chancellor Fincannon's office has been surveying development activities pursued by chairs (e.g. finding out information about department newsletters, possible solicitations made by chairs, etc.). This information will be integrated into the Office's plans for the future.
- Establish student scholarship fundraising as a dean-level priority for AY 16/17
 - This was a topic developed in the deans' workshop listed above.
- Target corporate contributions
 - The Office has plans to develop 1-, 3- and 5-year targets for corporate contributions. Metrics for these initiatives are planned for June 30, 2017.
- Establish vibrant Annual Campaign
 - The Office has a 10% Alumni giving target through planned solicitations.
 - The Office has a desire to increase participation in the faculty-staff annual campaign, which saw major gains in 2015. Given the recent recommendations at the university, the Advancement Advisory Subcommittee suggested (after a request for feedback from the committee) that this campaign be postponed for 2016. This is an area for potential growth as an annual campaign the future given last year's success (90% growth in 2015 from 2014).
 - The Office has engaged and plans to continue to grow retired faculty/staff annual giving. Growth in this area has been through planned giving in the past. Current plans are oriented toward a true annual campaign.

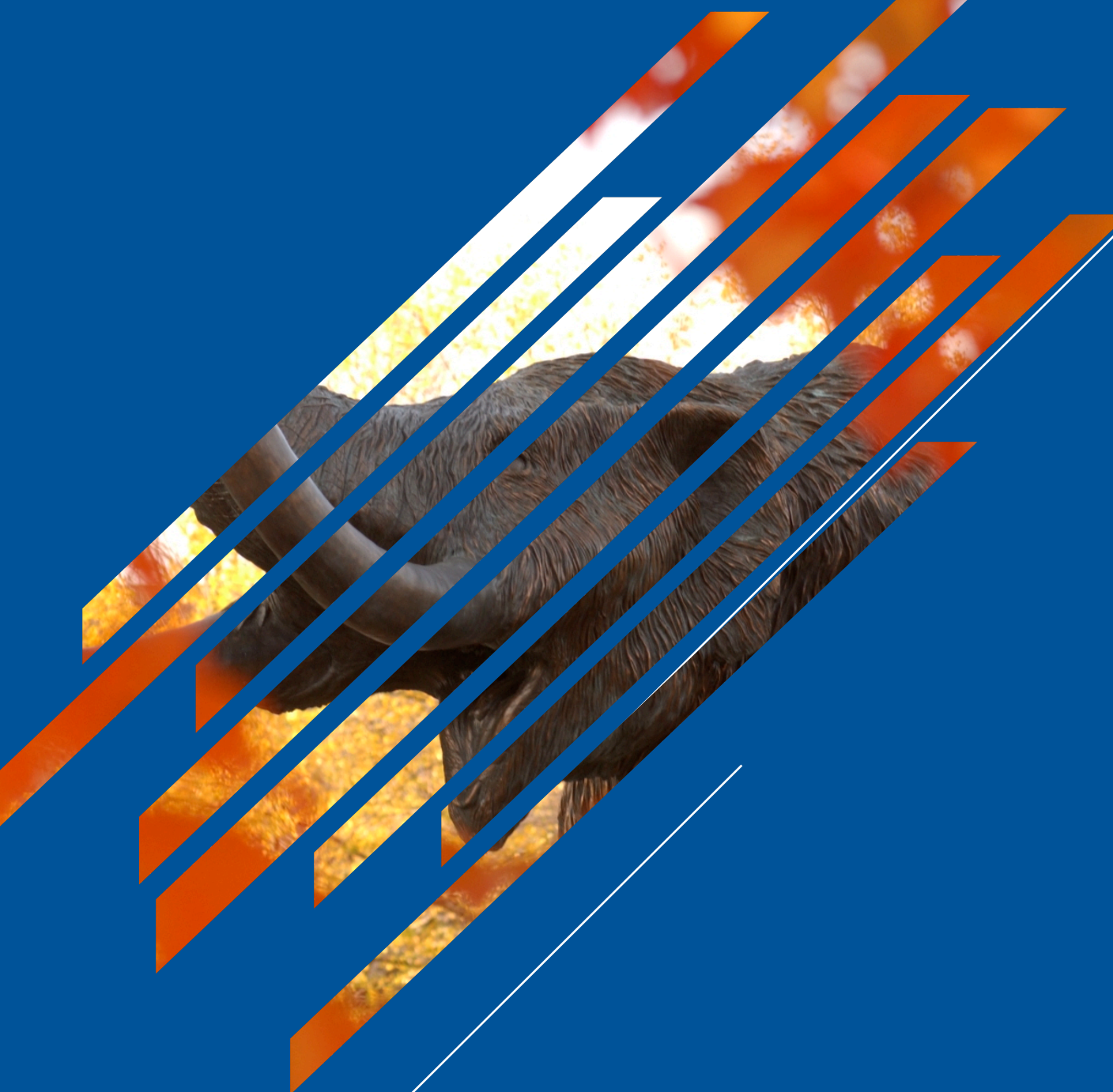
- Engage Alumni Association in fundraising
 - The Office is working to identify alumni-owned businesses to promote them and cultivate them as resources and potential donors. This is linked to the 10% target with aspirations for a 20% alumni giving in the near future.

3.8 Develop and implement a university-wide strategic marketing plan that includes modernizing ipfw.edu

- Regarding the marketing plan, Jack Patton developed and utilized audience profiles to implement brand positioning.
 - He worked with Center for Social Research to identify Collegiate Connection and other prospective students [ethnographic characteristics (behaviors) and psychographic characteristics (attitudes and aspirations)]
 - This orients messaging for advertising campaigns (IPFW Proud)
- Regarding the modernization of ipfw.edu, we include the website modernization plan with this document. The timeline for implementing the website modernization is as follows:
 - Request for Proposals (RFP) being authored now (mid-October). In early November, it will be distributed to vendors.
 - Jack will select vendors in December with a timeline proposed by late December/early Jan. 2017.
 - Web Advisory Committee gave top five priorities to guide website redesign and details of the RFP.
 - Phased launch will begin in Spring 2017: top level university content, enrollment management, recruitment, retention and advancement are marked at the first phase of the rollout.
 - The second phase of the rollout will be focused in academic units. Further details are included with this report in the website modernization plan.

2.9 Transition to an embedded service model

- Evaluate liaison model for Marketing
 - Only two Marketing Specialists (who can embed in colleges) are available for the entire university. The Office needs more resources to truly transition to embedded service and therefore it is not feasible at this time of constrained resources.



Division of Advancement

ANGIE FINCANNON, Ed.D.

INDIANA UNIVERSITY
PURDUE UNIVERSITY
FORT WAYNE



OUR MISSION

ALUMNI, DEVELOPMENT,
MARKETING COMMUNICATIONS, and COLLEGE TV

UNIVERSITY MISSION

Indiana University–Purdue University Fort Wayne (IPFW) is a comprehensive university that provides local access to globally-recognized baccalaureate and graduate programs that drive the intellectual, social, economic, and cultural advancement of our students and our region.

ADVANCEMENT MISSION

The mission of the Indiana University–Purdue University Fort Wayne Advancement Division is to **promote, advocate, communicate,** and **connect** the university through stakeholder engagement and support.



LEADERSHIP TEAM

Angie Fincannon, *Vice Chancellor for Advancement*

Bernie Lohmuller, *Director of College TV*

Colleen Dixon, *Executive Director of Advancement Services*

Dan Gebhart, *Business Manager and Contract Specialist*

Eve Colchin, *Director of Development/Major Gifts*

Jack Patton, *Executive Director of Marketing Communications*

Justin Shurley, *Director of Development for Athletics/External Affairs*



IPFW GIFTS

FIVE-YEAR AVERAGE

\$5,298,120

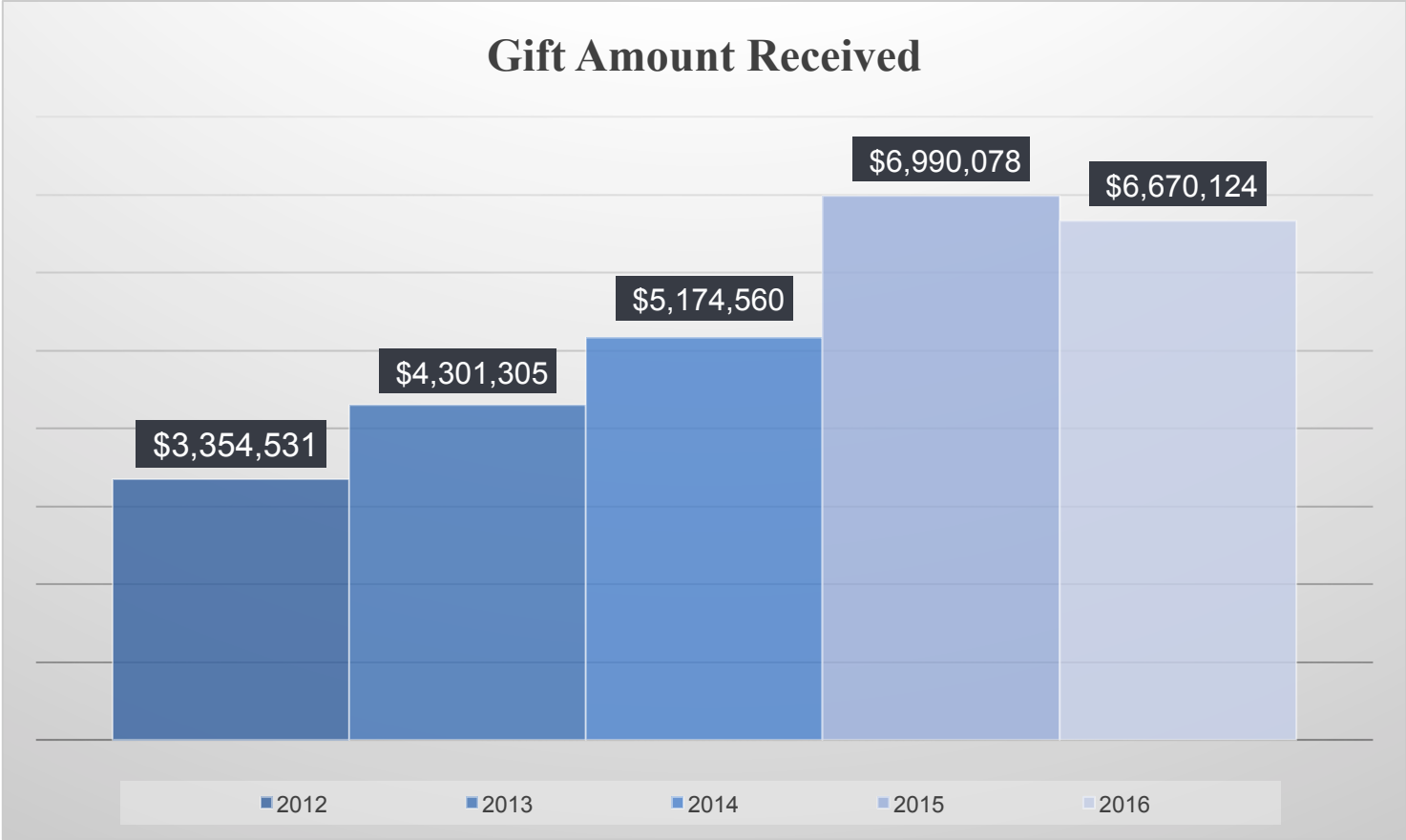
FISCAL YEAR 2016

\$6,670,124



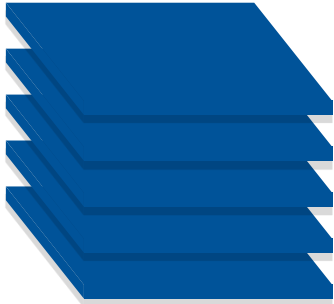
IPFW GIFTS

SINCE FISCAL YEAR 2012

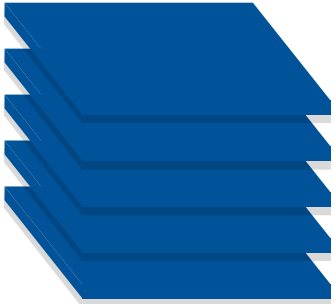


Fiscal Year Gifts to IPFW

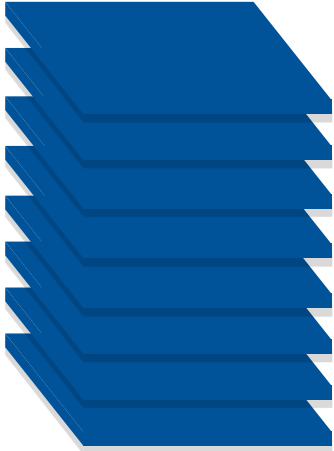
\$3,455,508
Cash



\$3,214,616
Other

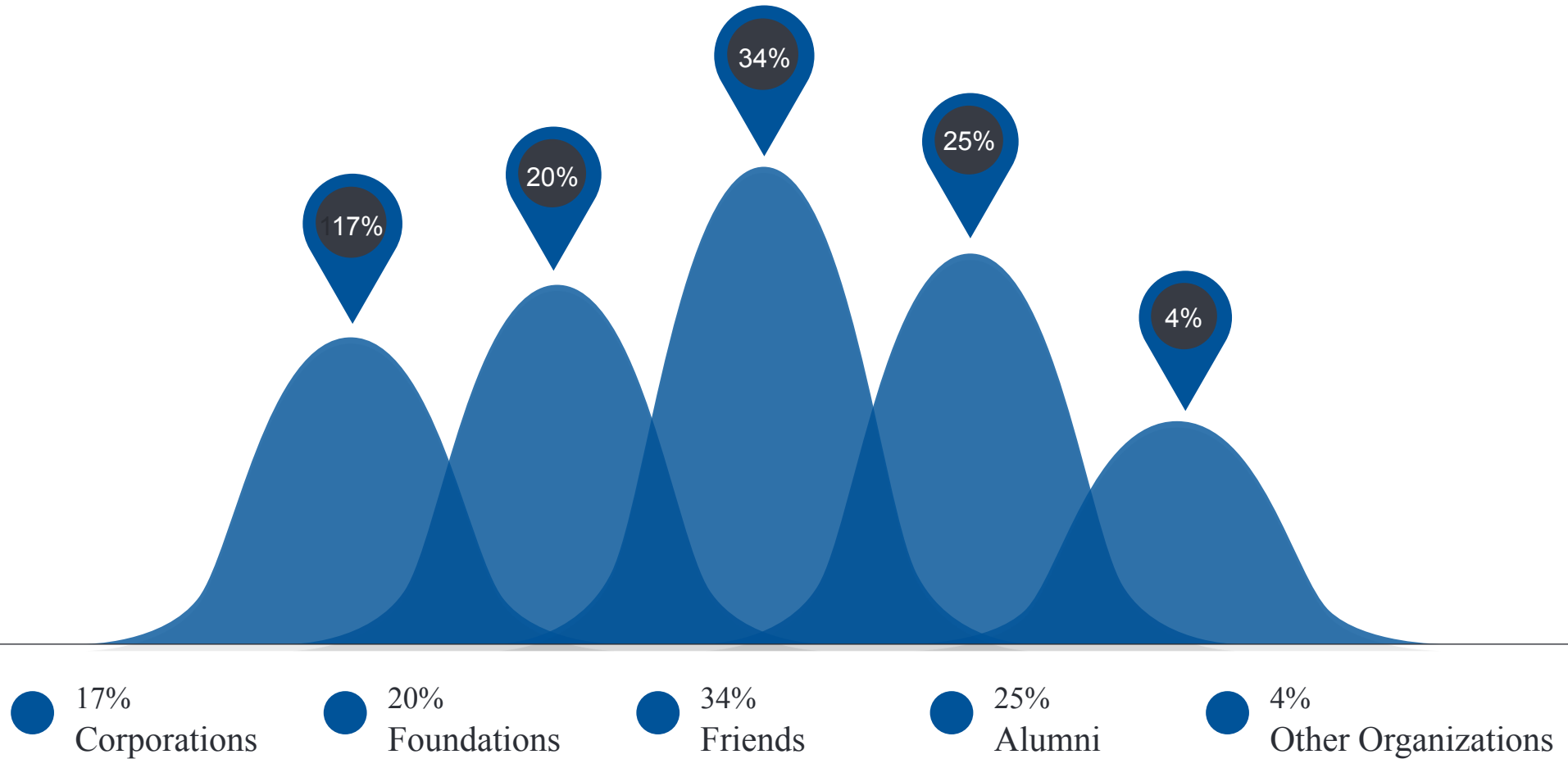


\$6,670,124
Total



Source of Gifts

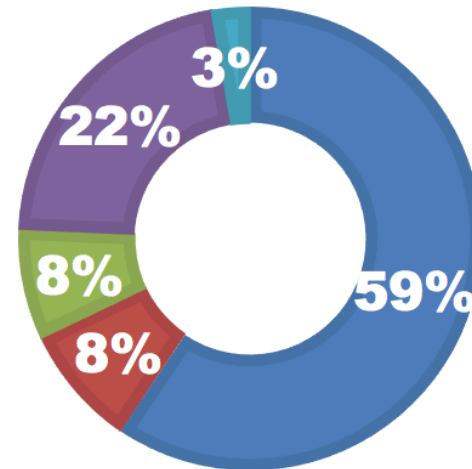
TOTAL RAISED FY 2016: \$6,670,125



Purpose of Gifts

WHAT DO GIFTS SUPPORT?

- Student Support
- Faculty Support
- Facilities
- Programs and Projects
- Unrestricted



Total Raised FY16: \$6,670,125



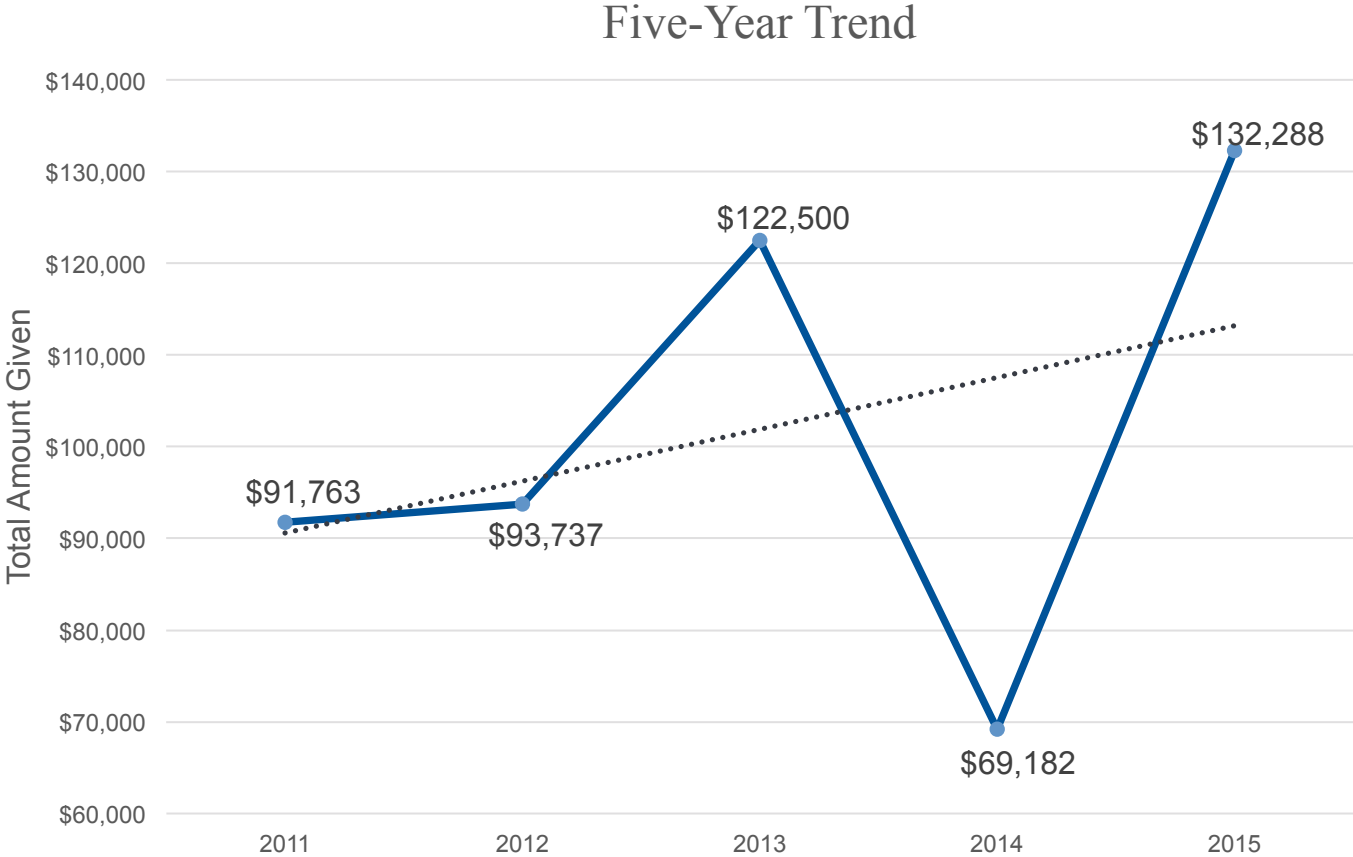
Priority #1 & Key Indicators

INTEGRATED, COMPREHENSIVE
ANNUAL GIVING PLAN

- Research
- Deans' Fall Appeal
- Faculty Staff Giving
(Common Goal)

Priority #1 & Key Indicators

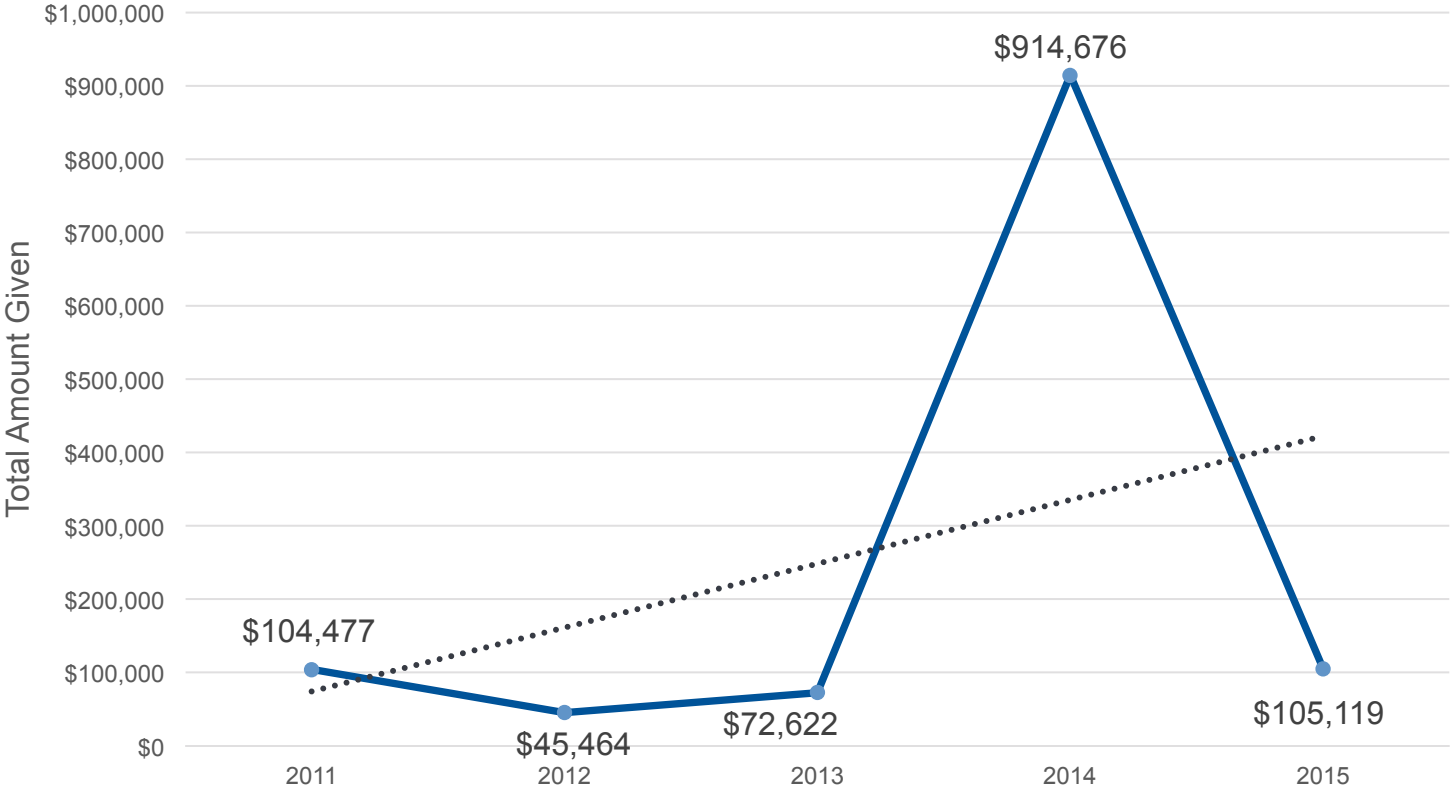
ANNUAL GIVING FOR CURRENT FACULTY AND STAFF



Priority #1 & Key Indicators

ANNUAL GIVING FOR RETIRED FACULTY AND STAFF

Five-Year Trend



Priority #2 & Key Indicators

INTEGRATED ALUMNI RELATIONS MODEL

Develop independent IPFW
association

Increase alumni giving

Boost alumni-owned business
support



Priority #3 & Key Indicators

CREATE A SUSTAINABLE DEVELOPMENT PROGRAM
THAT YIELDS \$10M ANNUALLY



- Planned giving
 - Weitzman Society Members:
Currently 28 planned gifts
- New endowments and scholarships
 - 189 current endowments:
\$53,000,000 total



Priority #3 & Key Indicators

CREATE A SUSTAINABLE DEVELOPMENT PROGRAM
THAT YIELDS \$10M ANNUALLY

- Academic partnership
 - Deans' workshop and toolkit
 - College Advisory Councils
- Corporate partnerships
- Foundations and grants
 - Build and grow relationships and opportunities



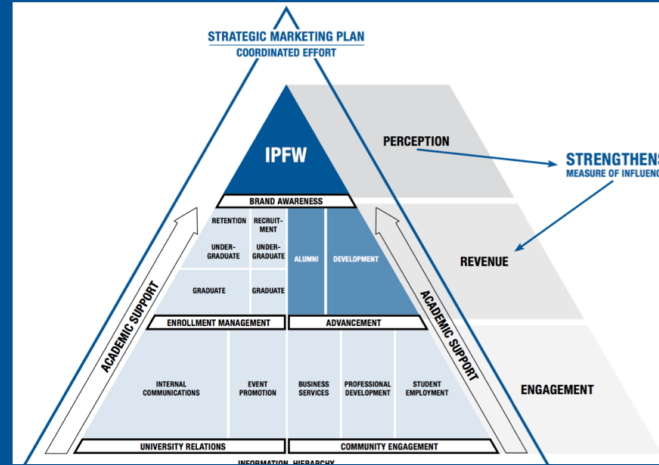
Priority #4 and Key Indicators

IMPLEMENT STRATEGIC MARKETING INITIATIVES

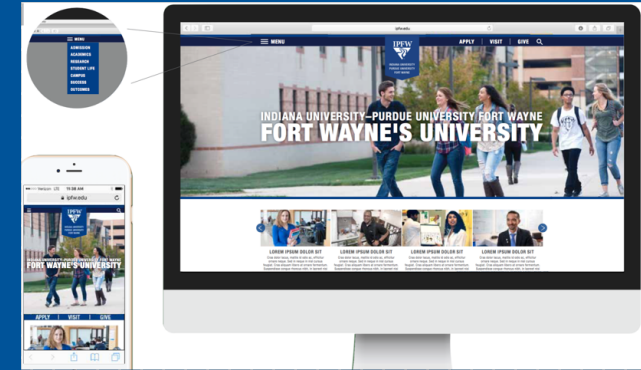


Market Research

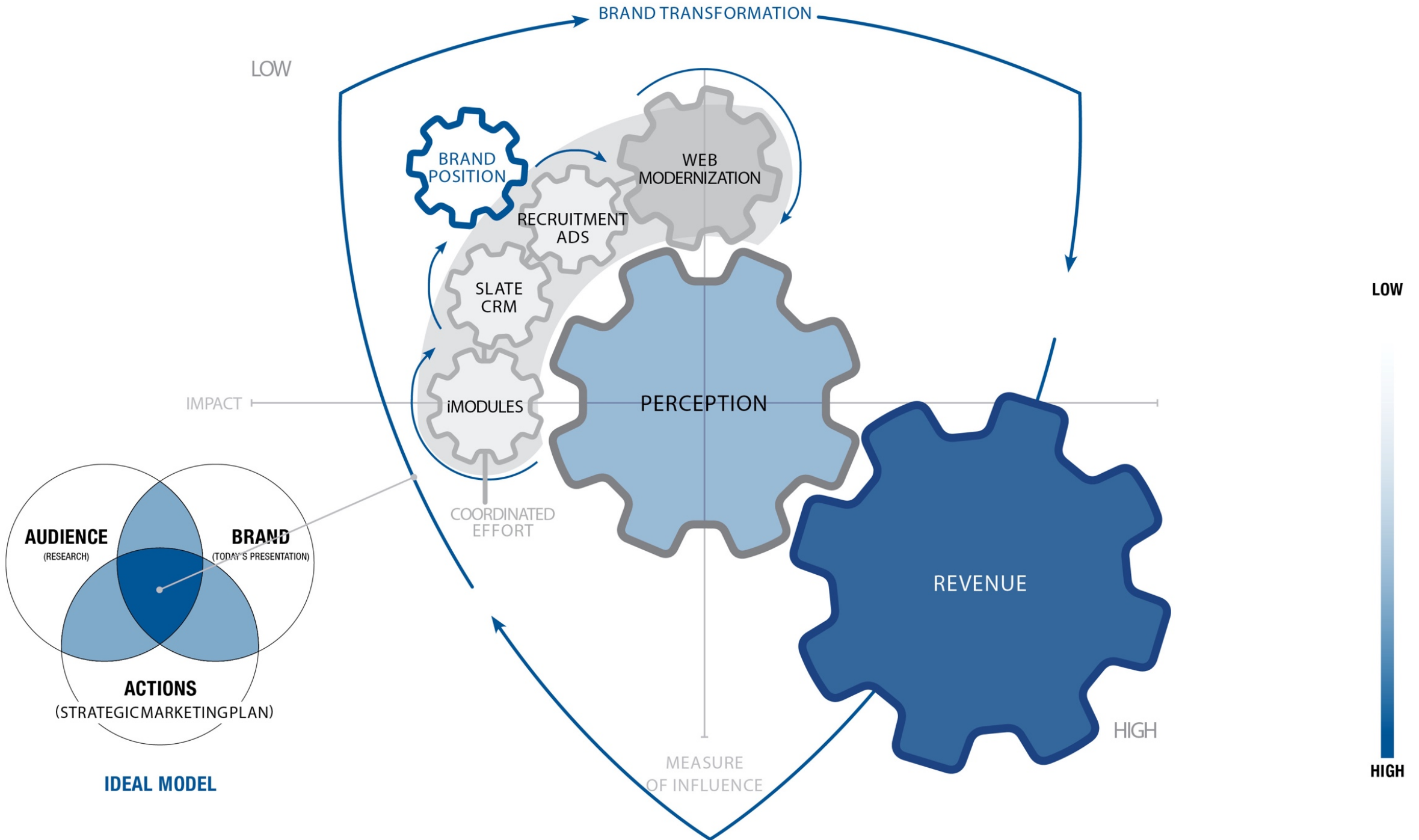
(students, alumni, and donors)



University Marketing Plan



Website Modernization Plan



BRAND TRANSFORMATION PLAN

DEVELOP

FALL 2016

- Fully develop and research/test concept for brand and sub-brands (colleges)
- Develop phase I Web modernization plan— Enrollment Management and Advancement
- Incorporate into Admissions' Slate CRM and advertising assets
- Integrate Advancement's iModules launch
- Conduct another round of personaresearch with students, alumni, and donors

LAUNCH

SPRING 2017

- New brand and sub-brand positioning
- Launch phase I Web experience— Enrollment Management and Advancement
- New Admissions CRM and advertising assets— fall 2017 matriculation
- New donor, alumni, and college-level communications via iModules
- Work with colleges to provide training

DEVELOP

SUMMER 2017

- Continue sub-brand and additional brand positioning (across all units)
- Launch campus training for brand and Web
- Develop phase II Web modernization plan— departments and auxiliary units
- Start full cycle student recruitment cycle
- Build Advancement plans for colleges

LAUNCH

FALL 2017

- Remaining brand positioning— departments and auxiliary units
- Phase II Web modernization plan— departments and auxiliary units
- Advancement plans for colleges

TIMELINES

Priority #1, Integrated, comprehensive annual giving plan

Priority #2, Integrated alumni relations model

Priority #3, Create a sustainable development program that yields \$10M annually

Priority #4, Implement strategic marketing initiatives

Performance metrics due June 30, 2016



THANK YOU

PROMOTE · ADVOCATE · COMMUNICATE · CONNECT



IPFW
HONORED PHILANTHROPISTS

GEORGIA WILBUR SMITH
MYRTLE BLANCHE FOSTER
ENGLISH BONTER MITCHELL FOUNDATION
PAUL E. AND DOROTHY SHAFFER
MR. AND MRS. RICHARD T. DOERMER
RICHARD D. DOERMER
KATHRYN DOERMER CALLEN



Website Modernization Plan

Proposal • January 21, 2016 • Version 3.2

BACKGROUND

In 2008 the university made a significant investment in a Web content management system developed by dotCMS. Direct costs of that investment have been approximately \$375,000 (including training) since 2008, with indirect costs (FTE) estimated at \$174,150 annually. While the university has paid for annual licensing, hardware, maintenance, support, and training for the system, more investment is needed to improve the site's design and functionality. Currently, the site's design and functionality are lagging behind in five key areas that adversely affect the user experience and should be a cause for concern given that the website is our primary marketing tool.

The modernization plan proposes to address those key areas and offer solutions to improve the user experience.

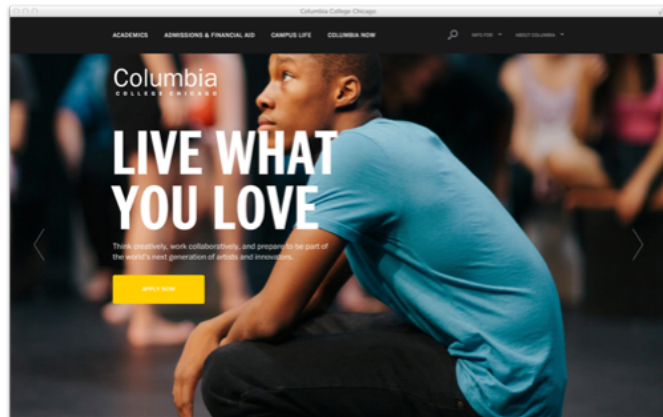
KEY ISSUES

The following have been identified as key issues with the university's website:

1. **Accessibility.** The system templates, widgets, and applications do not meet accessibility requirements and put the university at legal risk. Additionally, publishers need greater support as well as increased accountability in creating content that meets accessibility requirements.
2. **Mobile.** The use of smart devices has skyrocketed since 2008, yet the site is not mobile-friendly, nor is the content deliverable to the mobile app currently in development. Some statistics shed light on the current demand for mobile:
 - 80% of Internet users have a smartphone.
 - 34% of Internet users search using a smartTV.

- 9% of users use a smart watch to search the Internet. This number is expected to increase dramatically as Apple releases the Apple Watch in April 2015.

Since July 2011, desktop traffic on the website has dropped by 0.4%, and we have seen only a 2.8% increase in mobile traffic. The marginal gain in mobile traffic should be substantially higher given the dramatic increase in smart-device adoption and is most likely due to the website’s lack of mobile-friendliness. If we continue these trends we risk losing greater numbers of prospects. We have an opportunity to address this issue head on.



Home Page, Columbia College Chicago
Nationally recognized design of Columbia College Chicago.

3. Demand for new features.

The university’s website design and functionality have remained essentially the same since 2008, yet new developments in technology and design trends have continued to press forward. User expectations have risen equally as much. This has created a demand for new design and functionality that is greater than what current staffing levels in Marketing Communications and Information Technology Services can offer. Outsourcing the development of new features is essential.

- 4. Content quality.** The quality of published content is inconsistent throughout the site, and we see too many incidents of outdated, obsolete, and inaccurate content. Additionally, content is formatted inconsistently, or inappropriately, thus contributing to a poor user experience. Lack of structured content types means publishers (through no fault of their own) are left to make their own formatting decisions. Templates and pages are outdated and do not support new content needs. Applications such as the events calendar (currently under development in spring 2016) and the news room need a major overhaul. While addressing the

urgent needs of individual unit sites at the expense of the system as a whole, we have been neglecting our most important client—the university.

5. **Governance.** Revised governance is needed to solve the four key issues outlined above. Not enough accountability exists for how content is created on the site. Insufficient standards and support for creating brand-appropriate content contribute to the situation as well. There is no service-level agreement (SLA) for the Web content management system. Finally, not enough quality assurance exists to correct issues with content quality.

Please see “IPFW Website Design: Key Issues, Solutions, and Outcomes” for a detailed listing of key issues, recommended solutions, and outcomes.

PROPOSAL

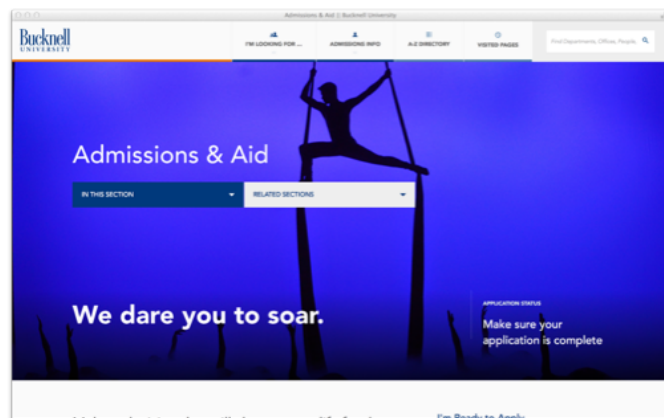
This proposal (1) outlines **solutions** to each of these key issues, (2) proposes **outsourcing** the development to modernize the site, and (3) recommends establishing **new governance** to implement and sustain the modernization plan.

OPTIONS

The university is at a crossroad with its website and has an opportunity to make significant improvements that can meet campus demand as well as user expectations.

Our choices appear as follows:

1. Approve the proposal and solutions outlined in this document and address these issues head on.
2. Abandon the use of the university’s Web content management system (100,000+ pages) in favor of a Web presence of fewer than 1,000 pages



Admissions Home Page, Bucknell University
Nationally recognized design of Bucknell University.

centrally maintained by Marketing Communications. This will mean shutting down several dozen websites and creating demand to hire additional Web staff in Marketing Communications to maintain a “core site.” One unintended consequence will be the proliferation of “rogue” sites hosted in the cloud that fail to meet brand standards or are unsupportable.

3. Maintain the status quo and fail to solve the key issues described above.

OBJECTIVES

The following objectives have been outlined to address the key issues with the website.

1. **Accessibility.** Ensure that all templates, themes, widgets, and applications in dotCMS meet strict accessibility requirements.
2. **Mobile.** Update the system so that content delivery is mobile-friendly and portable to the mobile app currently under development.
3. **Demand for new features.** Provide publishers with new features the campus demands and our users expect.
4. **Content quality.** Improve content quality while minimizing the impact on current resources.
5. **Governance.** Establish clear governance, standards, and training to implement and maintain the modernization plan.

GOALS

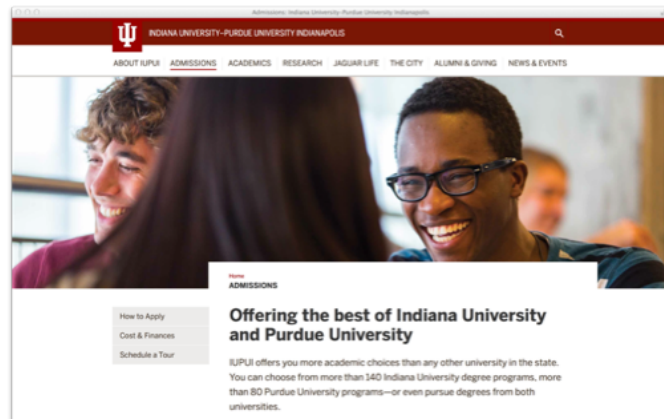
Meeting the following goals will help the university provide solutions to the key issues with its website and position it to support the strategic goals of the university.

1. **Accessibility.** Ensure that system components as well as publisher content comply fully with accessibility requirements.
 - **System level.** Ensure that system templates, themes, widgets, and applications conform to 508 Accessibility and Web Content Accessibility Guidelines 2.0 Level AAA requirements.

- **Content level.** Update standards, support, and training to help publishers create content that meets accessibility requirements for the modernized website. **Structured content types.** Develop structured content types that make it easier for Web publishers to meet accessibility compliance.
- **Annual publisher certification program.** Make accessibility a central component of publisher training and annual certification.

2. Mobile. Create a user-friendly experience for desktop, mobile, and wearable devices.

- **System level.** Ensure that templates, themes, widgets, and applications function equally well on desktop and smart devices.
- **Content level.** Update standards, support, and training to help publishers create content that scales appropriately for desktop and mobile devices.
- **Structured content types.** Develop structured content types that make it easier for Web publishers to create mobile-friendly content.
- **HTML5.** Revamp the underlying source code to deliver content to mobile as well as social-media platforms.
- **Annual publisher certification program.** Make mobile-friendliness a central component of publisher training and annual certification.



Admissions Home Page, IUPUI

Streamlined content and navigation are combined with authentic photography.

3. Demand for new features. Modernize the site by offering new features that the campus demands and users expect.

- **Visual design.** Update the visual design so that it meets current design trends and user expectations.
- **Identity System.** Apply signatures to unit-level websites and allow for more autonomy of unit site design.
- **Work smarter.** Find smarter and better ways to work with existing limited resources.
- **Efficiencies.** Leverage the efficiencies inherent in a Web content management system and make them work to our advantage.
- **Content redundancy.** Eliminate costs of third-party systems by replacing similar content and functionality with the Web content management system's capabilities.
- **Dynamic content.** Use structured content types and taxonomy to generate content automatically instead of placing this burden on our publishers.
- **Minimal resources.** Minimize the impact of the site modernization on Marketing Communications and IT Services staff by outsourcing development.
- **Personalization.** Personalize the user experience through customer profiles and targeted content.

4. Content quality. Improve the quality of content across the website.

- **Structured content types.** Develop structured content types that simplify the publishing process for publishers and make it easier for them to comply with standards.
- **Templates and page types.** Create new templates and page types that vastly improve the user experience.
- **Messaging.** Align messaging, authentic storytelling, and clearer calls-to-action to support strategic goals:
 - IPFW as a university of choice
 - Affordability and high quality of programs and services
 - Integrity, significance, and value of Indiana University and Purdue University degrees
 - Student success through learning, engagement, and outcomes

- Signature programs
 - Interdisciplinary, graduate, and international programs
 - IPFW as an intellectual, social, economic, and cultural driver
 - Diversity of the IPFW community
 - Philanthropic support
 - **Search engine optimization (SEO).** Improve search by increasing SEO rankings for important keywords.
 - **Domain authority.** Leverage SEO, navigation, and Web tools to raise domain authority of the website.
 - **Wayfinding.** Employ effective landing and category pages to improve content search and wayfinding.
 - **Web traffic.** Improve Web traffic for these key traffic indicators:
 - **Abandonment.** Decrease the number of visitors who abandon the site.
 - **Visit time.** Increase the time visitors spend on the site.
 - **Return visits.** Increase the number of return visits to the site.
 - **Submissions.** Increase the number of form submissions on the site.
 - **Click-throughs.** Improve how visitors click to find information on the site.
5. **Governance.** Establish new governance and policies for decision-making, input and feedback, adoption, and implementation of the plan. Sustain the plan beyond launch.
- **Roles and responsibilities.** Identify key roles and responsibilities for supporting the modernization plan.
 - **Stakeholders.** Meet with key stakeholders for feedback, input, and collaboration on the plan.
 - **Service-level agreements (SLAs).** Create service-level agreements at the administrative and publisher levels.
 - Outline administrative responsibilities and accountability for the plan.
 - Establish responsibilities and accountability for publishers.

- **Standards.** Provide standards for all new templates, themes, content types, and widgets to promote brand-appropriateness and a consistent user experience.

- **Guidelines.** Offer easy-to-understand guidelines for every content type provided in dotCMS.

- **Content policies.** Develop clear policies for specific types of content such as the homepage, A–Z index, landing pages, banners, events, etc.



Events Calendar, Oberlin College

User-friendly and easy-to-search events calendar built in dotCMS.

- **Content ownership.** Identify who is responsible for content, particularly content shared by multiple units.
- **Job descriptions.** Add standard language to job descriptions that specifies Web responsibilities for all publishers, their supervisors, and unit heads.
- **Training and support.** Provide training (in-class and video shorts) focused on standards and guidelines for the creation of brand-appropriate content.
- **Annual publisher certification program.** Establish a publisher certification program to provide accountability to standards, policies, and training annually. Revoke system access to publishers who do not meet certification standards.
- **Student Web publishers.** Hire and certify students to support unit-level websites.
- **Web expert group.** Cultivate a group of key publishers who can share content expertise with the rest of the WebCMS publisher community. Offer tutorials, blogging, and video shorts for supplemental instruction.

- **User testing policies.** Establish policies for testing and receiving feedback on system functionality. Focus on mobile and accessibility.
- **Benchmarks.** Establish clear benchmarks and metrics by which to measure success.
- **Design updates.** Apply regular updates to templates, themes, widgets, and applications.
- **System upgrades.** Stay current with the dotCMS system software.
- **Content review.** Conduct semesterly content reviews to remove obsolete content or update content.
- **Editorial calendar.** Align brand messaging and featured content with an editorial calendar. (Note: This portion of the plan has been approved and is currently under development in spring 2016.)
- **New features.** Release 1–2 new content features annually.

AUDIENCES

As part of the website modernization, the plan will clearly define our target audiences and target content based on user expectations.

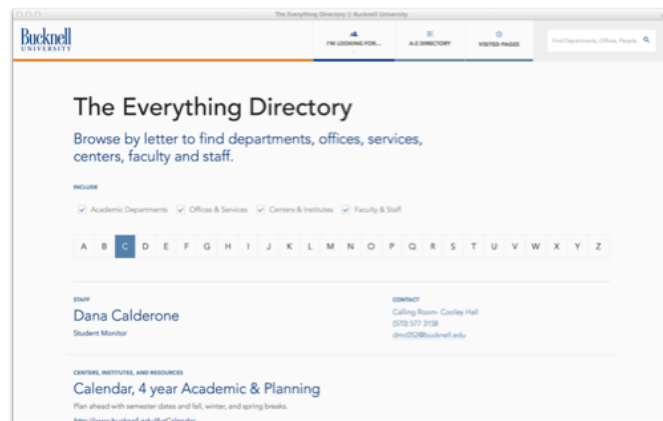
- **Customer profiles.** Create customer profiles for each key audience.
- **Targeted content.** Deliver content targeted to each customer profile:
 - Prospective students/guardians
 - Admitted students
 - Enrolled students
 - High school guidance counselors/teachers/principals
 - Alumni/prospective alumni
 - Donors/prospective donors
 - Faculty and staff/prospective faculty and staff

- Local community-at-large
- Key influencers
- Industry colleagues/publications

COMPETITION

Design and technology have changed dramatically since 2008. Below are general design trends found on today’s modern websites. The modernization plan should seek to integrate most if not all the design areas identified here:

- **Mobile.** Content scales appropriately for both smart and desktop devices.
- **Greater social integration.** Nearly all content is expected to be social in some way.
- **Storytelling and interaction.** The strongest way to engage users is to tell stories they can relate to and offer ways for them to interact and engage with content and other users.
- **Google maps integration.** Greater use of Google maps for wayfinding of events and locations helps users to show up.
- **Photography.** Professional, high-quality images play a more important role in page design than ever before.
- **Background video.** Sites are using background video to create impressions of activity and place.



A–Z Directory, Bucknell University

Exemplary A–Z directory for finding departments, offices, services, centers, faculty, and staff.

- **Energy and space.** Modern sites convey more energy and excitement and take advantage of space on the page.
- **Typography.** Due to improvements in font support, typography on the Web now matches typography seen in print.
- **Flat design.** The trend of flat design continues to convey the flat nature of touch screens.
- **Longer scrolling pages.** Users are now accustomed to longer pages (provided design and content are compelling).
- **Simplicity.** Greater emphasis is being placed on simplicity in Web and mobile design.
- **New menus.** Advanced, user-friendly menu systems are being used to improve the user experience on both desktop and mobile devices.
- **Performance and speed.** Users are charged for data usage, so speed is of the essence now more than ever.
- **Better multimedia experiences.** Users expect to have richer interactive experiences in the form of video, audio, animation, etc.
- **Subtle animations.** Modern websites enhance user interaction with clean, subtle animations that reinforce usability.
- Key features of the following university websites have been identified, and further research will be conducted pending approval of the proposal:
 - Primary Competitors
 1. Purdue University
 2. Indiana University
 3. Indiana University–Purdue University Indianapolis
 4. Ball State University
 - Sites for Feature Comparison

1. University of Notre Dame
2. Oberlin College*
3. UTHealth—The University of Texas Health Science Center at Houston*
4. Arizona State University*
5. Taylor University*
6. Pittsburg State University*
7. Aquent*
8. BBC News
9. Bucknell University
10. Columbia College Chicago
11. Indiana Tech
12. University of Saint Francis
13. Ivy Tech Community College

*dotCMS customer

ASSETS

Assets such as systems should be viewed as investments. The university has invested significantly in the following assets and should leverage these existing assets to advance the website to the next level.

- dotCMS Enterprise Content Management System. Build on, extend, and improve the university's content management system.



The Source, Oberlin College

Blogging home page featuring university stories with a conversational tone.

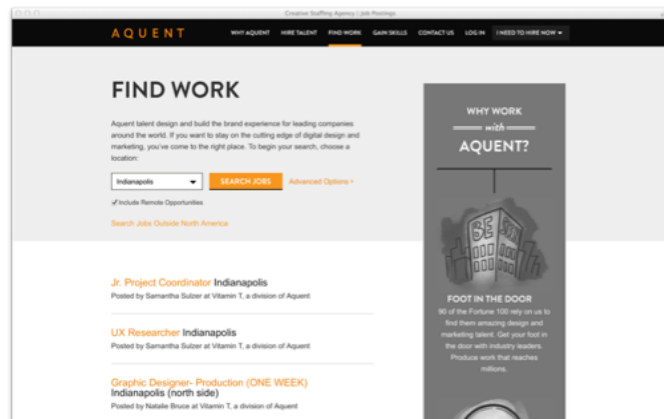
- **Identity system.** Apply the identity system to unit-level websites.
- **Standards.** Build on existing standards and apply them to the modernization plan.
- **Digital asset management.** Continue to replenish the digital asset management system and update it with new photography and graphics.
- **Training.** Improve and expand existing training for the modernization plan.
- **Compliance Sheriff.** Use Compliance Sheriff and other tools to analyze accessibility compliance of templates, themes, widgets, and applications (system level) as well as content (publisher level).
- **Publisher base.** Empower the publisher community to create brand-appropriate content.
- **Content.** Adapt content (text and images) from existing websites and printed materials.
- **Analytics.** Expand our existing Google Analytics to track more relevant data, set benchmarks for the site modernization, and make decisions for continuous improvement.
- **Mobile app.** Ensure that modernized content integrates well with the mobile app.
- **Other systems.** Explore content integration with online systems such as myIPFW, Acalog (academic bulletin), Taleo (ipfw.jobs), IntelliResponse (Ask the Don), Extensis Portfolio (digital asset management), etc.

DELIVERABLES

Contract with a dotCMS partner agency to create the following updated components in the university's Web content management system. Ensure that stakeholders and the agency have signed off on the requirements and use cases before implementation begins. The project should avoid scope creep so that all deliverables are met on time.

- **Templates.** These establish the baseline for how various types of pages are branded and structured.
- **Landing pages.** For use as home pages for units or campaign landing pages.
 - **Jumbo.** For use by the IPFW home page, large sites, major campaigns, or featured sites.
 - **Wide.** Appropriate for large sites and significant featured content.
 - **Narrow.** Appropriate for medium-sized sites and minimal featured content.
 - **Simple.** Appropriate for modest sites and minimal featured content.
 - “One-page Website.” Appropriate for landing pages and sites requiring a single page with animated scrolling.

- **Category pages.**
Help users more easily find what they are looking for by allowing them to sort more easily through large categories of content.



Job Site, Aquent

Excellent job-posting site housed in dotCMS and integrated with Taleo (the system used by IPFW Human Resources and Purdue University).

- **3-Column.**
Filterable
sorting page
with left-hand navigation and right-side related column.
- **2-Column.** Filterable sorting page with left-hand navigation.
- **1-Column.** Filterable sorting page with no navigation.
- **Detail pages.** Appropriate for body copy with detailed information.

- **3-Column.** Standard detail page with left-hand navigation and right-side related content.
- **2-Column.** Standard detail page with left-hand navigation.
- **1-Column.** Standard page for applications such as the events calendar.
- **HTML Newsletter.** Allow publishers to include and relate existing Web page content for broadcast to email distribution lists.
 - **3-Column.** Standard HTML email template with left and right columns.
 - **2-Column.** Standard HTML email template with right-side column.
 - **1-Column.** Standard HTML email template with no callouts.
- **Themes.** Themes reinforce the brand while allowing for variation in visual design through color, typography, spacing, icons, etc. The proposed themes offer possibilities for adding variation to sites on the ipfw.edu domain.
 - **Future.** Projects energy.
 - **Traditional.** Conveys tradition.
 - **Modern.** Feels contemporary.
 - **Simple.** Looks essential.
 - **Elegant.** Is formal.
 - **Casual.** Looks fun.
 - **Mastodon.** Is tough.
 - **Warm.** Shows warmth.
 - **Cool.** Looks crisp.
 - **Neutral.** Conveys quietness.

- **Structured Content Types.** Structured content creates consistent formatting, makes it easier to publish content in a consistent manner, allows content to be reused and dynamically shared across the site, centralizes information on the site for easier updates, and, ultimately, improves the user experience.

- The following is a representative list of content types designed to improve content commonly found on university websites. (See “Website Modernization Deliverables” for a complete listing of proposed content types.)

- Academic programs and courses

- Campus buildings and locations

- Events (updated with geolocation and event registration)

- Blogs

- Announcements

- Featured content (faculty, programs, blogs, etc.)

- Committees

- Policies

- Documents

- FAQ

- People



Home Page, BBC News

BBC websites set the highest bar for governance, standards, and accessibility.

- Experts
 - Jobs
 - Offices/departments
 - Contact information
 - Student organizations
 - Testimonials
 - Wiki
 - Etc.
- **Widgets.** Widgets make it easy for publishers to add content to parts of a website that normally require complex programming. These are commonly found in systems like WordPress and SquareSpace. Below is a representative list of widgets designed to provide better interactive user experiences. (See “Website Modernization Deliverables” for a complete listing of proposed widgets.)
 - Map widget
 - Multimedia banners
 - Polls
 - Photo slideshow
 - Video gallery
 - Events listing
 - Social media widgets (e.g., Facebook, Twitter, LinkedIn, Instagram, Pinterest)
 - Etc.
 - **Applications.** Applications are larger interactive tools that simplify complex content and transactions. The following are identified as vital to a university website:

- Events calendar with event registration and geolocation for wayfinding (currently under development in spring 2016)
- Virtual tour with photo and video galleries
- Interactive map with geolocation data for wayfinding
- Advanced search for general site content as well as specific content types such as academic programs and courses, people, departments and offices, etc.
- Advanced people search (directories) for faculty, staff, students, and alumni.
- Digital asset management for searching, browsing, filtering, and sorting downloadable files such as images.
- Job site for viewing current job postings and applying for jobs. Also used by employers to browse for potential candidates (i.e., students).
- Storefront for creating an easy experience for users to purchase tickets and online merchandise. Integrate with Touchnet for payment security.
- Etc.
- **Taxonomy.** Taxonomy refers to the categories and tags that allow content to be filtered, sorted, and related. This capability—one of the most powerful of Web content management systems—is what allows publishers and users to sort through large amounts of content. Ultimately, strong taxonomy greatly improves the user experience.
 - **Categories.** Content classification for better sorting and filtering.
 - **Tags.** Publisher- and user-generated keywords for sorting content.

FINANCING THE PLAN

The plan will require financing and outsourcing the development of new features for the university's Web content management system.

- Approximately two-thirds of the estimated costs will go to the development of templates, structured content types, applications, widgets, and taxonomy. The remainder is needed to develop new types of content (e.g., initial launch of featured stories, photography, and video) as well as rollout support for departments.

Plan Estimate

| Type of Work Outsourced | Deliverables | Responsibility | Estimated Amount |
|------------------------------|---|-----------------------|-------------------|
| Site development | Themes, templates and content/page types, applications, and widgets | dotCMS Partner Agency | \$150,000 |
| Backend support | System administration and enhancements | dotCMS Inc. | \$25,000 |
| Content development | Strategic content | Marketing agency | \$25,000 |
| Content migration assistance | Help departments with content | Student Web support | \$25,000 |
| Total Estimate | | | \$225,000* |

- The request is an investment of approximately \$2.25 per Web page.
- Additionally, the university should invest \$30,000 annually to renew system features.
- Note: A phased approach introduces several difficulties in implementing the plan. The pros and cons of such an approach must be carefully considered.
- *The Total Estimate does not include the \$29,500 allocated for the Events Calendar currently under development (spring 2016). Rapidly changing web technologies and a phased implementation may affect the total estimate.

RETURN ON INVESTMENT

- Successful implementation of the plan should result in a return on investment in the form of the following:
 - **Increased traffic, leads, and actions.** The modernized site boosts traffic and lead generations. A better user experience drive traffic to online actions such as applying, registering, purchasing, contacting, and making requests.

- **Fewer content and system silos.** Phase out existing vendor systems whose content and services can be effectively replaced by the Web content management system. Deliver features in the WebCMS such as chat, HTML email, blogging (Wordpress, Squarespace), virtual tour, interactive map, flip book, student organization content, FAQ systems, etc., that would otherwise be outsourced to a vendor.
- **Lower direct and indirect costs.** Eliminate direct and indirect costs of supporting many disparate systems.
- **Improved self-service.** Lower administrative costs through more effective self-services (ticket purchases, event registration, people directory updates, etc.).

IMPLEMENTATION

The following identifies what is needed to implement the plan and ensure fulfillment of accessibility compliance, mobile delivery, new feature deliverables, content quality assurance, and revised governance.

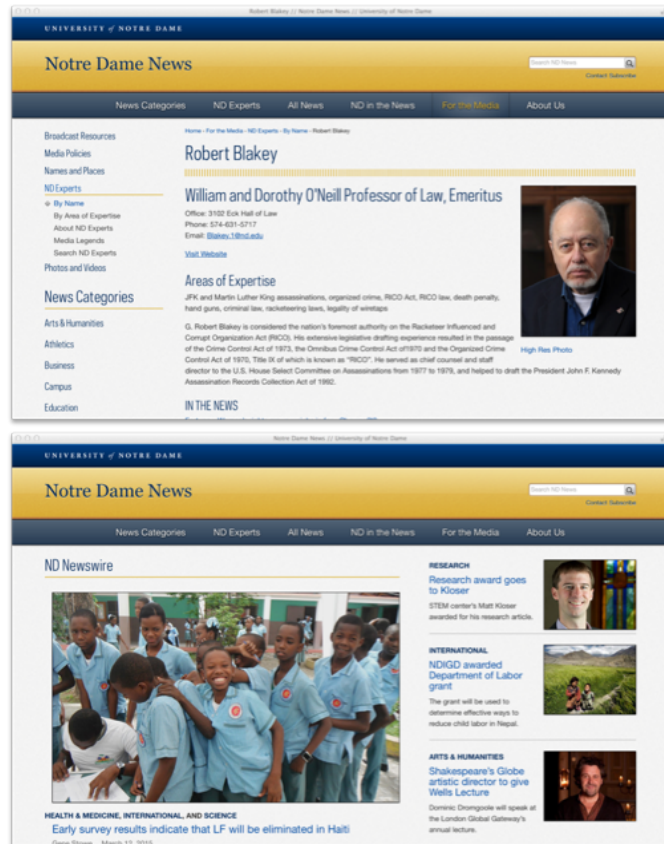
- Governance and roles
- Service-level agreements (SLAs)
- Digital strategy
- Marketing strategy
- Content strategy
- Search engine optimization (SEO) strategy
- Social Web strategy
- Content policies
- Standards and guidelines
- Training and support
- Annual publisher certification program

- Rollout plan
- Prioritization/migration plan
- Evergreen maintenance plan

PROJECTED TIMELINE

Note: Timeframes below need to be adjusted pending approval of the plan and the implementation strategy.

- Brief—Phase 1 (approximately 3 months)
 - **Project definition.**
Understand what the modernization plan is about.
 - **Target audiences/customer profiles.** Define and understand website users and customer profiles.
 - **Goals.** Establish clear target goals.
 - **Technical specs.** Define specifications such as browser and mobile support.
 - **Content inventory.** Establish the required content to be featured on the site.
 - **Resources.** Evaluate available assets such as systems and content.
 - **Project timeline.** Define project milestones and required time allotment.
 - **Project budget.** Identify necessary costs and define overall budget.



News Site and Experts Guide, Notre Dame

Well designed news site emphasizing photography and connecting news with faculty expertise.

- **Proposal feedback.** Seek proposal feedback and approval to proceed.
- **Planning—Phase 2 (approximately 3 months)**
 - **Research and concepts.** Conduct marketing research and create initial concepts.
 - **Information architecture.** Define website structures and content navigation.
 - **Taxonomy.** Develop categories and tags for filtering and relating content.
 - **Page layout.** Establish layouts for the different types of pages required.
 - **Usability.** Ensure ease of use through proper presentation of content.
 - **Wireframes and mockups.** Create initial page, widget, and application layouts and mockups.
- **Design—Phase 3 (approximately 2–3 months)**
 - **Color scheme.** Choose relevant colors based on identity system and research.
 - **Identity architecture.** Apply unit-level signatures to the design of pages.
 - **Artwork.** Design artwork such as banners and photographic treatments.
 - **Visual elements.** Design the site’s visual elements such as buttons and icons.
 - **Typography.** Choose appropriate font families, sizes, and other properties.
 - **Themes.** Create brand-appropriate themes that offer design variation across the site.
 - **Rich media.** Create required rich media such as animations and video.
- **Development—Phase 4 (approximately 3–6 months)**
 - **Staging servers.** Install the server to set up and test new design and capabilities.

- **Accessibility and standards.** Establish standards for new pages and content types.
- **Framework.** Develop the code framework.
- **Templates and themes.** Develop new templates and themes.
- **Widgets and applications.** Develop widgets (e.g., Facebook activity feed, Twitter timeline, top FAQs, etc.) and applications (e.g., events calendar, flip book viewer, digital asset management, etc.).
- **Functionality.** Implement the functionality for required features.
- **Content.** Integrate content within the website.
- **Site performance.** Ensure proper access speed and performance.
- **Security and permissions.** Implement necessary security and permissions for new templates, themes, widgets, and applications.
- **Workflows.** Implement and test publishing workflows for quality assurance.
- **Push publishing.** Test new push publishing feature in dotCMS.
- **Markup.** Implement required markup for SEO, social media, analytics, etc.
- **Launch—Phase 5 (length of phase to be determined)**
 - **Testing.** Conduct final testing of website features.
 - **Quality assurance.** Perform quality assurance tasks such as link checking and proofreading.
 - **Web analytics.** Test integration of Web analytics.
 - **Communication plan.** Communicate new features, rollout, and resources to campus.
 - **Training and documentation.** Provide training and documentation to campus.

- **Annual publisher certification program.** Establish a publisher certification program to reinforce training and standards annually.
- **Production server.** Push new templates, themes, widgets, and applications to live server.

Maintenance—Phase 6 (ongoing)

- **Support and troubleshooting.** Ensure technical support and troubleshooting of issues.
- **Design updates.** Continue improvement with planned updates to design.
- **Functionality updates.** Continue improvement with planned updates and new releases to site functionality.
- **Content updates.** Provide an editorial calendar and scheduled tasks for continuous updates to content.

NEXT STEPS

1. Evaluate/adopt the plan
2. Establish plan governance
 - Executive in charge
 - Information Technology Policy Committee
 - Web Advisory Committee
 - Key stakeholder groups
 - Chancellor
 - Student Affairs and Enrollment Management
 - Academic Affairs
 - Financial and Administrative Affairs
 - Advancement
 - Information Technology Services
 - Marketing Communications
 - WebCMS backend team
 - WebCMS frontend team

- WebCMS publishers
- 3. Finance the plan (project budget)
- 4. Define scope of plan (project brief)
- 5. Identify the deliverables (vendors)
- 6. Commit to project timeline

WEB ADVISORY COMMITTEE

The plan was reviewed and has been endorsed by the Web Advisory Committee. Feedback was sought via email and discussion of the plan took place during a meeting March 13, 2015. The plan has been well received and revisions have been made based on feedback.

- [Vacant], Alumni Relations
- James Burg, College of Education and Public Policy
- Steve Carr, Department of Communication
- Kenneth Christmon, Diversity and Multicultural Affairs
- [Vacant], Department of Visual and Communication Design
- [Vacant], Division of Continuing Studies
- Tonishea Jackson, Admissions
- John Kaufeld, Office of the Chancellor
- [Vacant], Human Resources and Office of Institutional Equity
- Jack Patton (co-chair), Marketing Communications
- Carlos Pomalaza-Raez, Department of Engineering
- Kasey Price, Student Life and Leadership
- Jeff Tipton, Information Technology Services
- Cheryl Truesdell, Helmke Library
- Barton Tyner (co-chair), Marketing Communications
- Maureen Davey, Marketing Communications

- Valerie Gough, Marketing Communications
- [Vacant], Student Representative(s)

Additionally, Eric Wagenfeld from Services for Students with Disabilities and Bruce Kingsbury from the Department of Biology have reviewed and expressed support of the plan.

REFERENCES

- Lee Gardner, **“Your College’s New Website Is Student-focused, Mobile-friendly, and Probably Long Overdue”** (Washington, D.C.: Chronicle of Higher Education, November 24, 2014).
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- Paul Boag, ***Digital Adaptation*** (Freiburg, Germany: Smashing Magazine GmbH, 2014).
- Stewart Foss, Cody Foss, and Andy Foss, ***The eduStyle Guide to Usable Higher-ed Homepage Design*** (eduStyle, 2009).
- Lance Loveday and Sandra Niehaus, ***Web Design for ROI: Turning Browsers into Buyers and Prospects into Leads*** (Berkeley, California: New Riders, 2008).
- Steve Mulder and Ziv Yaar, ***The User Is Always Right: A Practical Guide to Creating and Using Web Personas for the Web*** (Berkeley, California: New Riders, 2007).
- Erika Hall, ***Just Enough Research*** (New York: A Book Apart, 2013).
- Karen McGrane, ***Content Strategy for Mobile*** (New York: A Book Apart, 2012).

- Erin Kissane, ***The Elements of Content Strategy*** (New York: A Book Apart, 2011).
- Breandán Knowlton, ***A Practical Guide to Managing Web Projects*** (Penarth, United Kingdom: Five Simple Steps, 2012).

To: URPC
From: ACITAS
Date: October 28, 2016
Re: Action Plan 41 report on 1.2, 2.9, and 3.8

This September, the Senate Executive Committee directed ACITAS to research, evaluate the feasibility of, and make recommendations about how to proceed with items 1.2, 2.9, and 3.8 of IPFW's Action Plan 41.

Item 1.2

Research

ACITAS communicated with Irah Modry-Caron about the IR office's progress and plans relating to institutional data. Ira reported that they are evaluating data warehouse vendors and determining which reports and dashboards will be most helpful to IPFW leadership. They have already published several dashboards for deans and chairs. They are also working on streamlining some reports through Banner and Cognos.

Feasibility

ACITAS believes that this action plan item is valuable and will be feasible if the IR department receives the necessary financial resources to follow through with their data warehousing plan.

Recommendation

ACITAS recommends that IR be fully supported in pursuing fulfillment of item 1.2. We recommend that data and dashboards be made available to the campus community (rather than just administrators) whenever possible.

Item 2.9

Research

ACITAS talked with ITS about the current model of departmental support and discussed the possibility of moving to a more distributed model. Currently, ITS issues are handled by ITS centrally unless a department has funded a "Local Service Provider" (LSP) who provides intermediary support for that department. Right now there is no evidence to suggest that this service model is problematic. Mandating a distributed service model would disrupt current workflows and put an unnecessary financial burden on either ITS or the departments.

Feasibility and Recommendations

ACITAS believes a distributed model is feasible but not advantageous. We recommend that the current service model for ITS remain in place, with the understanding that this model may need review in the future based on shifting

needs across campus. We strongly recommend that ITS have the opportunity to rehire critical staff after the early retirement buyout to ensure that the current level of ITS support can be maintained across campus.

Item 3.8

Research

ACITAS met with members of the Website Modernization Team, led by Jack Patton. They are midway through an extensive process of detailing the requirements, personas, and processes for a new IPFW.edu website. The team is currently drawing up an RFP that could be submitted for bids in the near future, with early implementation rolling out as early as spring or summer of 2017. The team is using personas, personalization, and responsive (mobile-friendly) design principles with a focus on recruitment, retention, and advancement for their models. They are also prioritizing accessibility, which is federally mandated and which our current website does not offer in full. The team is working with a budget of about \$250,000. They are also developing plans for site governance, which will include ongoing training.

Feasibility

ACITAS believes that modernization of IPFW.edu is both essential and feasible. However, the team has a relatively small budget for the size and scale of the web development that is needed, which could create problems going forward.

Recommendation

ACITAS recommends that the web team proceed with its current plans as quickly as possible. We fully support this effort and recommend that the team be given the financial support necessary to accomplish its objectives in a timely fashion. We encourage the development team to continue using user-centered design principles and to do as much user experience research as possible throughout the design and deployment process. We fully support the team's plans for ongoing training requirements for content creators and we recommend that campus units consider prioritizing the role of web management and content creation since it is a key marketing function.