



# UMass Portal Strategy Discovery Report

## Constituency Analysis

**February 26, 2004**

Version 1.1

# Summary of Findings

- ▶ General consensus that providing student services first makes the most sense from a cost/benefit perspective.
- ▶ Across all potential users, application integration, single sign-on, personalization, and alerts are the most useful functionalities.
- ▶ General consensus among constituents is that campus content and branding for the portals should be controlled on a campus-by-campus basis. This would allow the portal to respect the uniqueness and integrity of each campus.
- ▶ Both system and many campus constituents see the value for a small content channel for the occasional and judicious communication of University-wide news and announcements of common interest.
- ▶ All campuses have budgetary constraints and have expressed concern over resources required to develop and support a portal initiative. Particularly, needs were expressed around content creation and management.
- ▶ Email address for life would likely be useful
- ▶ Constituents involved with alumni value the ability to evolve the relationship with a student from applicant to alumnus through a portal.

# Approach

The major tasks undertaken during the constituency analysis were:

- ▶ Defined constituency groups in order to determine the unique needs, motivations, behaviors and attitudes of users. The following constituency groups were surveyed:
  - Students
  - Faculty/Research
  - Admissions
  - Staff/Administration
  - Alumni Relations/Institutional Advancement
  
- ▶ Interviewed constituents from each campus to determine how they currently interact with the University and what they need in terms of a portal offering. In addition, we interviewed the CIOs and technology staff at each campus to determine strategic IT direction, technology standards, and system details.
  
- ▶ Translated interview findings into key themes and actionable recommendations that would cater to the unique portal requirements of each client constituency and campus.

# User Segmentation

	Students	Faculty/Research	Admissions (Applicant Perspective)	Staff/ Administration	Alumni / Advancement (Alumni/Donor Perspective)
<b>“I want to know”</b>	<ul style="list-style-type: none"> <li>▶ When my assignments are due</li> <li>▶ My grades as soon as they are available</li> <li>▶ My exam schedule</li> </ul>	<ul style="list-style-type: none"> <li>▶ News relevant to my field</li> <li>▶ My benefits status</li> </ul>	<ul style="list-style-type: none"> <li>▶ My recruiting calendar</li> <li>▶ Where am I in the application process?</li> </ul>	<ul style="list-style-type: none"> <li>▶ What are my benefits?</li> <li>▶ What’s happening on campus?</li> <li>▶ Policies and procedures</li> </ul>	<ul style="list-style-type: none"> <li>▶ What’s happening in the university?</li> <li>▶ When are alumni events occurring?</li> </ul>
<b>“I want to have”</b>	<ul style="list-style-type: none"> <li>▶ Tools for registration</li> <li>▶ Access to Bursar’s office</li> </ul>	<ul style="list-style-type: none"> <li>▶ An easy way to submit grades</li> <li>▶ Access to my advisees’ records</li> </ul>	<ul style="list-style-type: none"> <li>▶ Access to information on student life</li> </ul>	<ul style="list-style-type: none"> <li>▶ Tools for managing student information</li> <li>▶ Access to training schedules</li> </ul>	<ul style="list-style-type: none"> <li>▶ Email address for life</li> <li>▶ Links to affinity programs</li> </ul>
<b>“I want to interact”</b>	<ul style="list-style-type: none"> <li>▶ With my professors</li> <li>▶ With my peers</li> <li>▶ With administration</li> </ul>	<ul style="list-style-type: none"> <li>▶ With my students</li> <li>▶ With fellow researchers</li> <li>▶ With administration</li> </ul>	<ul style="list-style-type: none"> <li>▶ With admissions counselors</li> <li>▶ With other applicants</li> </ul>	<ul style="list-style-type: none"> <li>▶ With faculty</li> <li>▶ With students</li> <li>▶ With my peers</li> </ul>	<ul style="list-style-type: none"> <li>▶ With other alumni</li> <li>▶ With alumni relations</li> </ul>
<b>“I want to be engaged”</b>	<ul style="list-style-type: none"> <li>▶ See current community calendar of events</li> <li>▶ Participate on student message boards</li> <li>▶ View personalized information</li> </ul>	<ul style="list-style-type: none"> <li>▶ See current community calendar of events</li> <li>▶ View departmental information</li> <li>▶ Schedule conference rooms</li> </ul>	<ul style="list-style-type: none"> <li>▶ Personalized content on university news (e.g. football scores).</li> <li>▶ Submit essays online.</li> <li>▶ Virtual campus tours</li> </ul>	<ul style="list-style-type: none"> <li>▶ Access to reporting system</li> <li>▶ Collaborate on documents</li> <li>▶ Schedule conference rooms</li> </ul>	<ul style="list-style-type: none"> <li>▶ Make donations online</li> <li>▶ See news about other alumni</li> <li>▶ Read personalized content</li> </ul>

# Student Findings

## Key Quotes

- *“There is really no good online tool for student-to-student interaction... Most interactions take place in person”*  
-Steve Athenas, Student, UMass Lowell
- *“This is my first semester, so I don’t know what functionalities are currently offered, but it would be most convenient if we could get our grades online, interact with our professors online. The more communications with professors, the better.”*  
-Muhammed K Sillah, Student, UMass Boston
- *“I have had a couple of classes with an online component. If the professor understands the tool, it is very effective.”*  
-Steve Splinter, Student, UMass Dartmouth
- *“I’ve been asking my friends what they would think about a portal. The response has been fantastic – ‘When are they going to do it?’”*  
-Ben Sutton, Student, UMass Dartmouth
- *“It would be useful to syndicate and allow ‘subscription’ to published information on the lecture series and events.”*  
-Ralph Zottola, Associate CIO, UMass Worcester

## Trends

### Current Offerings

- Amherst is farther along with student self-service via SPIRE
- On many campuses, it is a struggle to get students to use university email accounts
- Common theme of too many usernames and passwords

### Desired Portal Functionality

- Course scheduling
- Grades
- Single Sign On
- Event calendar
- Self-service billing
- Alerts
- Access to existing library information
- Syndicated content
- Message boards
- Student government elections
- Housing/roommate selection
- Personal calendar

### Accessibility

- Many students connect from off-campus so performance is key
- Regulations require accessibly for disabled students
- Usability very important for adoption.

# Student Findings – By Campus

## ▶ Amherst

- Flagship campus with on-campus student population.
- Web-based student self-service for academic and financial information is already available via SPIRE.

## ▶ Boston

- Commuter campus, so portal would be useful in providing a sense of community. Also, this makes off-campus connectivity speeds crucial to a portal's success.
- Currently working on PeopleSoft student self-service, which would address some desired online functionality. Many courses have online components already.

## ▶ Dartmouth

- 96% of students have computer with them or on campus, with a sizeable commuter population
- Many courses have online components – particularly in the CIS Department. WebStudent system exists for checking grades and registering for classes. Currently hosts online bulletin boards for student discussions.

## ▶ Lowell

- Relatively low-tech student body consisting of day, continuing ed, and distance learning students
- Currently no web self-service available, although they are working on next PeopleSoft release.

## ▶ Worcester

- Med school class is 100 students, graduate school is around 85 students with target of 200 students in 3 years
- Med students don't require online registration – they have their classes predetermined upon enrollment. They have been building "web services". Current Intranet is portal "like."

## ▶ UMassOnline

- Students expressed interest in a portal. Collaboration and access to academic and account information were viewed as important.

# Faculty Findings

## Key Quotes

- *“A portal could really help faculty organize their daily tasks on an individual level and for collaboration on research.”*  
- Tim Shea, BIS, UMass Dartmouth
- *“Within Isenberg we have created an instruction oriented portal to help students work as teams and collaborate via online tools.”*  
- Gino Sorcinelli, Isenberg School of Management, UMass Amherst
- *“I use Prometheus for online coursework and I would prefer a more light-weight tool... Students find the tool to be confusing and clunky and it puts them off of online tools.”*  
- Fred Johnson, College of Public and Community Service, UMass Boston
- *“We receive large emails twice a day with campus news, and we never know whether the content will be relevant or not. It would be great if this could be replaced by a portal. That way my inbox wouldn't get cluttered.”*  
- Jean Pierre Kuilboer, Chair of MSIS, UMass Boston
- *“I like the idea of managing forms for Grants online.”*  
- Richard Upchurch, CIS, UMass Dartmouth

## Trends

### Current Offerings

- SPIRE provides access to class rosters and instructor schedule.
- Faculty news mechanisms appear to be the victims of budget cuts.
- Some department level initiatives (Isenberg School of Management)

### Desired Portal Functionality

- Grade submission
- View advisees' records
- Campus news/activities
- Portfolio for research activities, documents
- Ties to departmental sites
- Ties to online course management product
- Access to electronic forms for grants
- Alerts
- Single sign-on

### Accessibility

- Many full-time professors and most part-time professors need access from home.
- Training for the new system would have to be offered.

# Faculty Findings – By Campus

## ▶ Amherst

- Isenberg School of Management has developed an instructional portal to encourage student collaboration.
- SPIRE offers web access to faculty to review class roster and instructor schedule.
- General concern about ensuring security across aggregated applications.

## ▶ Boston

- About 1000 full and part-time faculty, with a sliding scale between teaching and research. Many faculty access online university resources from home. There is a wide range of technological skill-sets.
- Faculty interviewed showed particular interest in improving courseware offering, calendar functionality, and personalized content.

## ▶ Dartmouth

- Interested in a portal that can help them organize their daily tasks: calendaring, document sharing, online forms, managing student information (e.g. grades)

## ▶ Lowell

- Mix of technical proficiency amongst faculty. Many faculty already using online components for classes.

## ▶ Worcester

- Faculty currently post class notes online, starting to add multimedia.
- Currently, faculty have two mail, network accounts between hospital and school. Hard for them to keep track of who is on what.

# Admissions Findings

## Key Quotes

- *“High School students are used to being online and would like to have info and immediate responses. Admissions could do more online and students would be happy.”*  
- Susan Goranson, Undergraduate Admissions, UMass Boston
- *“More effective communication with prospects is important.”*  
- Liliana Michle, Head of Undergraduate Admissions, UMass Boston
- *“In terms of recruiting, I am most interested in marketing to prospects... What keeps their attention? How can we Make it easy to get the info they need in a single place?”*  
- Wayne Williams, Assistant Director of Undergraduate Admissions, UMass Dartmouth
- *“In the absence of a recruiting portal, we could use the student portal as a marketing tool for prospective applicants .”*  
- Undergraduate Admissions, UMass Lowell
- *“Campus specific identity and information are critical to the recruiting and admissions process.”*  
- Stephanie Chapko, Undergraduate Admissions, UMass Amherst
- *“How do we effectively handle the transition from applicant to matriculated student?”*  
- Elizabeth Pyle, Registrar, UMass Amherst

## Trends

### Current Offerings

- Generally happy with current self-service offerings.
- Would like to have essay submission online.
- Currently experiencing usability issues with internal systems.

### Desired Portal Functionality

- “Ask the Advisor” section for prospective students
- Streaming video of campus life
- Status check for applicants
- Recruiting calendar
- Aid in transition from applicant to matriculated student
- Personalized content depending on applicants’ interest
- For staff, access to freshman surveys and grad surveys for admissions staff

### Accessibility

- Online access is available for a majority of applicants

# Admissions – By Campus

## ▶ Amherst

- Interested in improving the transition for students from the application process to matriculation.
- As the Flagship campus it is important that they maintain their unique identity and not be subordinate to the system.
- Current PeopleSoft system has usability and performance issues; in particular for data entry.

## ▶ Boston

- Undergrad Admissions has 25 in undergrad office staff plus 10 student assistants. Grad department is smaller – approximately 10 people.
- Staff believed that role-based access is very useful because content can be targeted and the system could help guide prospects to the appropriate information. Currently, Boston already has a prospect area online.

## ▶ Dartmouth

- Currently use PeopleSoft and SIS systems for tracking prospects. In terms of a portal, are particularly interested in keeping the attention of prospects and making it easy to get the information that they need in a single place

## ▶ Lowell

- 25% of Lowell's student population low income and they don't necessarily have electronic access or experience. Must maintain non-electronic means of getting Lowell message out.
- Admission personnel here were least enthusiastic about a portal – suggested that a student portal would be equally effective as a marketing tool.

## ▶ Worcester

- Unique process for the Medical School.

# Administration Findings

## Key Quotes

- *“Reviewing HR benefits online would be useful.”*  
- UMass Dartmouth
- *“The value of a portal is a single point of login and contact.”*  
- Brian Sullivan, UMass Dartmouth
- *“It would be really nice to have self-service HR.”*  
- Assistant Comptroller, UMass Lowell
- *“Overall, I would really like one simple way to get to everything (all types of data across systems) .”*  
- Peter Langer, Associate Provost, UMass Boston
- *“Unified access to news and information would be useful.”*  
- Jacqui Watrous, Director of Administration and Finance, UMass Amherst
- *“Better inter-campus communication and collaboration tools would be helpful.”*  
- Steve O’Roirdan, Budget Director, President’s Office

## Trends

Current Offerings	Desired Portal Functionality	Accessibility
<ul style="list-style-type: none"> <li>• Currently experiencing usability issues with internal systems.</li> <li>• Would like better reporting capabilities.</li> <li>• Would like to reduce outbound email volume.</li> </ul>	<ul style="list-style-type: none"> <li>• Inform about training classes</li> <li>• HR changes</li> <li>• Payroll changes</li> <li>• Policies and procedures</li> <li>• Online collaboration</li> <li>• Forms</li> <li>• Access to directory</li> </ul>	<ul style="list-style-type: none"> <li>• No known accessibility issues.</li> </ul>

# Administration – By Campus

## ▶ Amherst

- Single sign on capabilities would be useful.
- Also interested in unified presentation of news and information.
- However, cost is likely not justified to build these services just for employees.

## ▶ Boston

- Currently using a number of systems, awaiting newest PeopleSoft rollout.
- Particularly interested in providing HR and benefit information available online, along with alert functionality. Would like better access to student information for mailings, etc.

## ▶ Dartmouth

- Approximately 1000 full time faculty and staff. Very anxious to have staff functionality included in a Portal (e.g. Training and benefits information).
- Provide online tools for students that aren't currently being used.

## ▶ Lowell

- Currently, most interaction with students is personal. Looking towards PeopleSoft rollout to achieve many self-service functionalities.
- Current reporting process is cumbersome and would like an easier means for extracting PeopleSoft data.
- Portal would be a good place to advertise unique programs offered by the campuses, such as Lowell's Tsongas Center

## ▶ President's Office

- Improving inter-campus communication and collaboration are important.
- The ability to promote a judicious amount of University-wide content through an enterprise portal is critical.

# Alumni / Advancement Findings

## Key Quotes

- *“You’re preaching to the choir!” The question is when can we have a portal?”*  
- Don Berube, Alumni Relation, UMass Dartmouth
- *“If you want people to give (money), then the more information about the university the better, so a portal would be a good thing from that point of view ”*  
- Alumni Services, UMass Lowell
- *“It would be useful to have a unified picture of an Alumnus (e.g. if Alumnus has an undergrad degree from Boston and a grad degree from Amherst) ”*  
- Diane Richardson, Assistance Vice Chancellor for Alumni, Family, and Constituent Relation, UMass Boston
- *“Alumni at Worcester is a small group, but we are not reaching out to them effectively.”*  
- Ralph Zottola, Associate CIO, UMass Worcester

## Trends

Current Offerings	Desired Portal Functionality	Accessibility
<ul style="list-style-type: none"> <li>• Generally happy with online alumni offering but would like online donations.</li> <li>• Need better data on alums</li> </ul>	<ul style="list-style-type: none"> <li>• Bulletin boards</li> <li>• News and promotion</li> <li>• Personalization</li> <li>• Affinity links and information</li> <li>• Online contributions</li> <li>• E-commerce</li> </ul>	<ul style="list-style-type: none"> <li>• Scholarships online</li> <li>• Lifetime email addresses</li> <li>• Reporting to track data for Institutional Research</li> <li>• Alerts for staff</li> </ul> <ul style="list-style-type: none"> <li>• Reliable and fast is very important</li> </ul>

# Alumni / Advancement – By Campus

## ▶ Boston

- Approximately 14 staff in the department, most people work on campus
- Use Advance and SunGuard as a trust system. Currently involved in a collaborative effort to migrate from Advance to Millennium with Dartmouth and Worcester. Currently major needs for reporting and collaboration systems.

## ▶ Dartmouth

- Institutional Advancement Group is undergoing re-organization but the timeframe is TBD. Afterwards will be 6 to 10 staff in Advancement.
- Most enthusiastic about portal for promoting fundraising amongst alumni.

## ▶ Lowell

- Currently do paper mailings. Some bulk email campaigns. There was an online community for alumni for a few years, it provided some benefit but there was no funding to continue.

# Client Survey Rankings

Constituents were asked to rank common components from 1 to 3 (3 = highest value). Only 1 ranking per component was allowed.

Ranking Scale	
Value to Customer	
High	3
Medium	2
Low	1

Functionality	Constituent Group					Average
	Student	Faculty	Admissions	Staff	Alumni	
Application Integration	3.00	3.00	3.00	3.00	3.00	3.00
Document sharing	2.00	3.00	3.00	3.00	1.00	2.40
Threaded discussion	3.00	2.00	1.00	1.00	3.00	2.00
Online meetings	1.00	2.00	1.00	1.00	1.00	1.20
Personalization	3.00	3.00	3.00	3.00	3.00	3.00
Channel Information	3.00	2.00	1.00	1.00	2.00	1.80
Alerts	3.00	3.00	3.00	3.00	3.00	3.00
Customization	3.00	3.00	3.00	2.00	3.00	2.80
Single sign-on	3.00	3.00	3.00	3.00	3.00	3.00
Search	2.00	2.00	3.00	3.00	2.00	2.40
Instant Messaging	1.00	1.00	1.00	1.00	1.00	1.00

# Functionality Ranking Chart

