

TRUST AND IDENTITY



TIER Campus Success Program (2017-2018) Summary Report

January 28, 2019



Document Repository Info

Repository ID: TI.122.1

Persistent URL: <http://doi.org/10.26869/TI.122.1>

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Sponsor: Internet2

Superseded documents: (none)

Proposed future review date: January 2019

Subject tags: Campus Success Program, CSP, adoption, education

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Background and Program Overview

Background and Program Overview

Created in 2017 in response to a community survey, the TIER (Trust and Identity in Education and Research) Campus Success Program, comprised of a diverse group of higher education institutions, committed to adopting and deploying the TIER software components and helping to accelerate adoption for the rest of the trust and identity community.

The purpose of the 2017-18 Campus Success Program (CSP) was to:

- Accelerate local adoption of TIER components to provide the community with guidance more quickly
- Assist campuses in the successful deployment of TIER-packaged components to address one or more campus need(s)
- Provide lessons learned about the local challenges and solutions
- Develop deployment guidance and advice for later adopters in the form of presentations, project reports, and locally produced TIER-related artifacts
- Inform the TIER program about issues encountered in production implementation
- Provide data for next steps regarding adoption support, technology development and the feature set

Program planning began in July 2017 and included a call for proposals. After thorough review, ten diverse campuses (Colorado School of Mines, Colorado State University, Georgia Tech, Lafayette College, Oregon State University, Rice University, University of California - Merced, University of Illinois Urbana-Champaign, University of Maryland Baltimore County and the University of Michigan) were accepted into the first cohort of the CSP.

The one-year program officially kicked off in October 2017. CSP participants had access to facilitated peer engagement, a multitude of subject matter experts (SMEs), and received targeted training and education to help with deployment. For their parts, campuses:

- Developed local implementation and deployment plans to address one or more campus needs and to document the investment of time and resources

Background and Program Overview

- Engaged with the cohort in bi-weekly work sessions on successes and challenges
- Collaborated at a face-to-face meeting with the SMEs to identify common key challenges and areas of interest to address together
- Developed public [final reports](#) and contributed case studies and other valuable artifacts back to the community to support further adoption

Major Milestones

Major Milestones

Major program milestones centered on face-to-face collaboratives, training opportunities, and delivery of final campus case studies.

Major Milestones

Milestone	Date
Call for Proposals	July 2017
Announcement of Participants	September 2017
Virtual Kick-Off Meeting	October 2017
TechEx 2017	October 2017
Shibboleth Training	November 2017
Q1 Program Assessment	January 2018
Face-to-Face Workshop	February 2018
midpoint Training	March 2018
Q2 Program Assessment	April 2018
Global Summit 2018	April 2018
Q3 Program Assessment	August 2018
TechEx 2018	October 2018
Program Retrospective & Lessons Learned	October 2018
Program Closure	October 2018
Campus Case Studies Published	October 2018

Summary of Campus Projects

Summary of Campus Projects

Major program milestones centered on face-to-face collaboratives, training opportunities, and delivery of final campus case studies.

	Shibboleth	Groupier	COmanage	midPoint
Colorado School of Mines		✓		✓
Colorado State	✓	✓	✓	✓
Georgia Tech		✓		
Lafayette College	✓			✓
Oregon State				✓
Rice	✓	✓		✓
U. California-Merced	✓	✓		✓
U. Illinois	✓	✓		
U. Maryland Baltimore County	✓	✓		✓
U. Michigan		✓		

Program Management Overview

Program Management Overview

This interactive program was designed to enable an environment of collaboration with frequent report outs of progress against project plans. Primary methodologies to support campus needs and promote peer support included:

- A program wiki space to house program artifacts and supporting materials
- Facilitated bi-weekly work sessions for campus report outs
- Face-to-face engagements to foster professional relationships and shared learning
- Regular engagement via Slack channels and office hours to connect program participants with SMEs and to one another
- Dedicated email lists and shared document repositories for participants
- Frequent demonstrations and guidance of the TIER solutions

Program Outcomes

Program Outcomes

By engaging in face-to-face meetings and being involved with the TIER working groups, program participants were able to uncover issues and easily share best practices. As a result, solutions could be implemented much faster that could have been achieved on their own.

Several campuses were able to move all (or a portion of) their project plans into production, others landed in a test environment, and some progressed to a point of better understanding of requirements and necessary resources to bring plans to fruition. Universally, the cohort agreed that one of the most valuable outcomes was the underlying community of practice that developed over the course of the program.

The program concluded at TechEx 2018, when participants shared the outcomes of their project plans and lessons learned during the inaugural program. Campus case studies and presentations can be found within each of the [campus' wiki pages](#).

Lessons Learned

Lessons Learned

Quarterly assessments were conducted throughout the program to gauge overall satisfaction with the program. A final retrospective was held with campus leads to harness lessons learned.

Overall themes identified were:

- **Program Start Up and Support.** Internet2's support of the Program was well staffed and helpful. Campuses, however, need more training earlier in the program and more direction on how they should participate until they understand how a cohort works.
- **Collaboration Modes & Tools.** Overall, the different methodologies employed to support the participants were very helpful, but several minor suggestions came up for how to make it more successful. As usual, face to face meetings were very helpful in building trust among the cohort. Blogging on campus progress was understood as primarily benefiting those schools looking to adopt the software platform, but sometimes it was difficult to find the time to do it.
- **Overall Program Design.** The basic design of the program was determined to be sound: requiring campus plans, meeting regularly to drive local progress, providing training, and collaborating with peers and subject matter experts. Participants requested more training earlier in the program as well as a documentation framework. They also asked for more structure around how the campuses work together and with the subject matter experts as opposed to leaving it up to them to reach out. This is especially helpful early on before the face to face meeting and initial groundwork for personal trust has been built.
- **Campus Resourcing.** The participants reflected that the campus plans designed at the outset were sometimes too ambitious for the amount of time in the program. Given the program was a year in duration, it was also difficult to sustain the effort needed. Several had issues with keeping on track due to competing priorities and observed that having adequate local resources to devote for the full year would have been very helpful. There was clear interest in helping to mentor the next round of CSP schools.

Future Work and Conclusions

Future Work and Conclusions

The inaugural CSP was funded by one-time TIER investment dollars, which covered the investment for staff facilitation and support, along with SME efforts. The one-year CSP program cost was an estimated \$356,000 after all the staff time and meeting expenditures were tallied. Additional expenses, such as travel to face-to-face meetings and training engagements, were at the responsibility of campus participants.

The next CSP program (now renamed Collaboration Success Partners and scheduled to commence in 2019) will continue helping organizations looking to get up and running with the packaged software and the InCommon Federation. Designed to take the previous findings into consideration, Internet2 will be shortening up the program length, including earlier/ enhanced support and training options, helping participants develop focused plans to ensure success, and providing dedicated access to SMEs and the CSP alumnae.

The fee-based program will commence in 2019. Both higher education and research institutions are encouraged to join.

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