

Data Stewardship Committee: Minutes of January 23, 2017

In attendance: Craig Abbey (OIA), Gary Pacer (EAS), Sue Huston (EAS), Mark Molnar (OIA), Brian O'Connor (OIA), Tom Okon (EAS), Greg Olson (VPEM), Michele Sedor (OIA), Shirley Walker (Student Accounts), ark Coldren (HR), Joe Mantione (OIA), Leah Feroleto (SW), Steven Heist (EIS), Brice Bible (CIO), Rachel Link (OIA), Michael Korona (Registrar), Michael Caine (JSMBS), Rich Rosen (Oracle), Gloria Kunik (Oracle/Ciber), Scott Weber (AA/SL), Beth Corry (Financial Services), Laura Hubbard (CFO), Laurie Barnum (RP), Peter Elkin (JSMBS).

Meeting called to order at 3:01 p.m. by Gary Pacer.

Gary provided a historical background of the Oracle/Ciber business intelligence (BI) insights conducted in 2016. Brice Bible invited them to take part in interviews and focus groups with key UB stakeholders and other participants. After these interviews and groups concluded, Oracle would then make recommendations for product solutions and areas that might need attention. The initial interviews were held on February 24 through 26, 2016, with additional interviews on April 7. On April 29, 2016, Oracle presented their findings to Brice Bible. On May 20, Oracle again presented their findings and recommendations to Brice, Scott Weber, Craig Abbey, and Provost Zukoski.

Gloria asked what had changed at UB since their last visit. Gary stated that Data Cookbook had been implemented, and Michele provided details on its launch, training plans, and implementation. Craig provided further information on Data Cookbook implementation across platforms like SIRI and Tableau.

Gloria next provided a list of attendees and the feedback that oracle/Ciber had collected from these individuals. She reviewed the UB goals:

- Build the brand
- Identify new sources of revenue
- Produce reports that are clear, accurate, and explainable
- Simplify decision making
- Agree on systems of record, system owners, data owners, and users.

Specific feedback under “Simplify Decision Making” received included difficulties joining data; cumbersome analytics, and difficulty agreeing with numbers. She asked if attendees today felt these were still relevant or challenges, and those in attendance agreed. Brian stated that he felt progress was being made, but these were still valid concerns. Brice stated that these will always be works in progress.

Gloria next reviewed comments of note, with attendee responses where relevant:

- What can't you do, and why?
- Data, not technology, inhibits reporting

- Reporting could be improved but context is just as inept.
- Brian O'Connor has a respected model for student flow (Brian states this model is now in use by several units- it is part of the resource planning and tuition revenue model process)
- There is a true call for a central source of data
- Constant disagreement on numbers
- No one takes responsibility

Data transparency is a goal. Success is defined as understanding the data, both raw and transformed states; understanding who is in charge of what data; resolve data, tool and process silos, and coming together in an enterprise solution.

Craig stated that progress is being made on central sources of data but there are still some issues on combining data sources. For example, trying to calculate research per square foot, which requires tying grants to PI to space. Instructional productivity is another difficult area. Tom agreed with the issues in integrating data across sources, stating that research and grant data are messy.

Laurie stated that they are in a transitional phase currently, looking at the best ways to share data across unit or department levels, and looking for tools or platforms to assist with this. Some may use Tableau, but other reports may go out through SIRIS. Units may not know where to go for reports or why. Laura agreed, and said that she sees it as a layer of issues, we have data, but not all may understand it, or how to report it. Reporting has been siloed in the past. We want to integrate it in the future and understand how things relate to each other.

Gloria mentioned that a lack of data transparency can lead to not understanding the transformation of data and therefore not trusting reports. Tom stated that while standard reporting is backed up, if people instead use ad hoc queries from Info Source, they may not get the same results since they miss the transformation that can happen. Gloria suggested explaining the ETL processes that happen to users, comparing, for example reporting of enrollment numbers for state purposes versus PR purposes. Michele mentioned that Data Cookbook allows for including all kinds of information about data, sourcing, and the like into reports.

In terms of disagreements on numbers, progress continues to be made. Communication with units has helped. Laura stated that in her five years at UB, she has seen much progress in acceptance and agreement on numbers when going through the budget and planning process, Michael Caine agreed. Leah saw progress towards transparency and said while the numbers may vary, progress is being made to understand how this variance occurs.

In terms of the comments on “no one takes responsibility”, Mark saw more people taking responsibility for data that fell under their purviews. He gave examples of data requested by SUNY: people worked together, and instituted quality control processes to provide information. Brice felt that the creation of the Data Governance Council and identifying data stewards has helped the process of identifying who is responsible.

Gloria asked the group if performance based funding was used in NY. Laura stated the closest we have was the \$18M awarded based on proposals which was called “performance based”.

Gloria reviewed the recommendations from Oracle/Ciber:

- Document the university demands for data
- Decide on an organizational model and make it successful through cooperation and governance
- Create a data flow with data definitions and owners
- If different parts of UB will have different instances or systems from one another, then build the data exchange, ETL, or whatever is required following the data flow, definitions, and ownership
- Acquire data analysis tools and applications that supplement, not compete with or detract from, what we already own.

Brice asked what Oracle sees at other institutions like UB, where data come from so many sources, both internal and external. Gloria stated that a data warehouse is still the place to put data you’re working with, whether it is internal from an external organization like AAUDE. She suggested providing one place that can accept transformations. In terms of BI solution, Oracle now uses BI Cloud, but data will still need to be normalized before entry.

Peter discussed his experience with the Oracle Research tool, saying it is potentially possible to take definitions and import them. There is the expertise at UB to do whatever is needed for the “data lake” in medical data to transform it into a data warehouse.

ERP is exploring ways to look at cost data warehousing. Costs are a concern at other institutions as well, stated Gloria. Laura mentioned that we did not understand our own operating costs, and therefore may make assumptions that are not correct. This is an issue across higher education in general.

Gloria asked for UB’s next steps. Laura stated that an important piece of the documentation process is that it is a continual process for updating and improvement. When we work with units with shadow systems, those units found no need for a central data warehouse, because they often lacked understanding of what the centralized data were. There was a need for education about the data and the tools that we have to use them to improve understanding.

Next meetings will be February 20 at 4 p.m. in Capen 567. The 2017 schedule has been distributed to DSC members.