University Technology Advisory Committee

Western Oregon University

Meeting Minutes

May 19, 2023 1pm-2:30pm

[**Zoom link**](https://wou-edu.zoom.us/j/83048247579?pwd=VE5kYno1RVdIRXZDejN0NnNIaG5NUT09)

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Committee Attendees:

Guests: Tina Fuchs, Sean Roush

Notetaker:

Next notetaker: Michael Ellis

[Notes from April meeting](#)

Agenda

UTAC Google Group

Michael & Chelle will talk about how to leverage it for our work together.

New Tech on Campus

As you listen to our guests introduce these new technologies, please be thinking about what a UTAC review process might have looked like, if one had existed when the decision was made to implement this. Would this be an appropriate technology for UTAC to review? What aspects of it make it appropriate or not appropriate for UTAC review? What questions should UTAC be asking about it, if we were reviewing it?

- Wolfie the ChatBot (1:00pm)
- [Exxat](#) (2:00pm)

Minutes:
- Will meet after Tina's presentation to discuss how UTAC would have fit into the purchasing process
- EdSights: chatbot. Finishing 3rd year of contract for chatbot for recruitment
- Came into the middle of the contact, not knowing it existed
- EdSights wanted to talk about how to use the chatbot for retention, not just recruitment
- Tina & SSA saw demo, took it to Strategic Enrollment Team -> President
- Presentation by Tina

- - Every 2-3 weeks the chatbot sends a message (SMS to cell) to all students
  - Named "Wolfie"
  - Tool has an administrative dashboard (managed by SSA)
  - 4-14% student retention increase across Universities
  - Retention SMS chatbot +Website Bot
  - All students opted-in, students can opt-out at any time. Initial text has option to opt-out (with instructions)
  - 95% of students have stayed opted in
  - 2-3 week message pattern this term
  - 1st message include "How are you feeling about the spring term?" - with 3 options
  - Follow up provided for students who responded with needing more help
  - WOU has answered over 300 questions from Edsights. Added some of our own
  - A student in a health crisis will be directed by Wolfie to SHCC or 911
  - Will send message to all graduating seniors
  - Send nudge to students to registration
  - Code in Banner that Samantha can use to pull who is graduating
  - Amy: coordinate messaging with Registrar's office (for graduation)
  - $8000 (wolfie) + $2000 (web bot) for 3 yr contract. Static cost, not cost per SMS
  - Model continually optimized
  - EdSights - Extremely good support
  - 90% stayed opted in at WOU
  - 38% engagement at WOU
  - Dashboard Presentation
  - Brittany Kima is aware, and there is some coordination between Wolfie and social media posts
  - Web bot - hoping to launch in Fall
  - Chelle: web bot could be infrastructure to help get standardized answers
- UTAC would be a good place to discuss tech like Wolfie SMS bot
- Poses new questions: how do we gather cell phone #'s, use, etc…
- We should have a database of software that we own - people didn't know we have this tool
- Michael Ellis didn't know about wolfie and would have found it useful to know about it. Was just talking with Advancement about texting alumni; Bookstore was asking how to text students about overdue payments; what could it be used for? What should it be used for? There is enough representation in this group to tackle those questions - and it is timely - four people in the past week
- GZ: Who determines the final "edit". Clear scope. "Unified voice" for reviewing content (marketing vs care team vs …)
- Tina: emailed Bill, assigned Kolis (Michael just didn't know). Reached out to Registrar, etc…
- Only 3 people can authorize a message (Tina, Paige, Jenn Koshnick)
- Very judicious about messages that are sent out. Specific to campaigns (Registration nudge, graduation congrats). Won't inundate

- How can UTAC help with those kinds of issues? All the coordination
- Sean: Exxat
  - Introductions
  - Website demo: Coordinate clinical placements, curriculum mapping
  - Part of OT program: students will go out on multiple clinical placements (3?)
  - 2x level2 placements
  - 14 weeks capstone placements
  - Software to help manage all that. Student info, and site info
  - Student can review and rank sites, and the site does the matching (overrides possible for accommodations). Needed for transparent process for assignment
  - Tracks all data, including contracts, assessments - all integrated with OT association of Oregon
  - Tracks immunizations, criminal history checks, drug screens,
  - https://exxat.com/programs/
  - Most user friendly software for users
- Chelle: Other programs are out there. Exxat is pretty specific for health sciences? Are there other programs and that do health AND education? Sean: nope
- Sean: reference picture below (programs list)
- Jennifer: Could we re-use this for Janet Roberts' work?
- Amy: data retention requirements? Grad students - lots of state reqs (20+ yrs). How would it work for Public Safety to get access to find someone?
- Camila: Yes, I was thinking both that and the athletic training for the HEX folks
- Sean: Clinical placement is most critical. Immunizations also important. Can we utilize SHCC system(s) for some
- Amy: Do we need to pull any information out to store for long term student records?
- Chelle: Banner integration? Sean: we hope so. Waiting for staff to fully analyze
- Amy: Do we need an RFP? Sean: it's built into budget
- Chelle: What kind of tech implementations need to come through UTAC? Analyze time-to-implement. UTAC helping to prioritize projects. What WOU resources do we need to implement? Can we outsource
- Michael Ellis: new to our procurement process in the past 6 months, technology purchases go through UCS (Michael) for a cybersecurity audit. Before Marlee goes to the effort of drawing up a contract, the tech has to pass the cyber audit. A UTAC process could be embedded at that point as well (concurrent with legal working on the contract).
- FERPA/HIPAA data will make this the most closely examined software we've been through for the cybersecurity audit. It will be our first HIPAA data software approval.
- Amy: it would be helpful to know more about what a cybersecurity audit involves. Also there is contract language specific to FERPA, and also considerations related to how a software is stored
- Sean: Next step is demo, then start the contract process
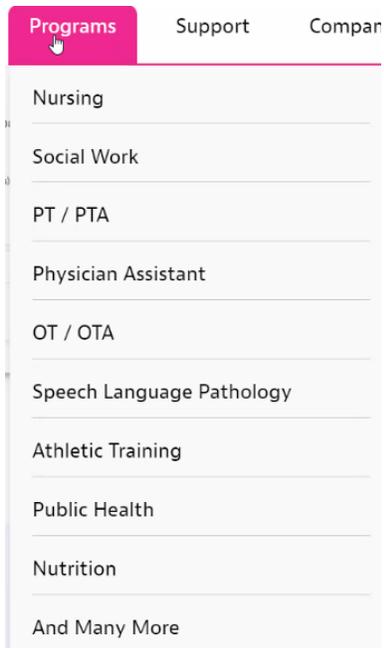
UTAC Next Steps

- Confirm membership & willingness to become standing subcommittees (discussion: what are the advantages of joining with UTAC? What are the requirements?)
  - Data Integrity Group
  - Banner Function Coordinating Committee
  - Ellis: I'd like to create a DocStar Functional user group
- Open up nominations for a committee tri-chair (to be elected at June meeting)
- Membership - confirm ongoing members. Send out calls for new committee members from the areas identified in our new charge (new members would join UTAC in fall)

Minutes:

- Confirm our membership. Make sure folks who are on want to stay or rotate off.
- DIG: setup presentation for UTAC about what DIG does. Lots of details in DIG that UTAC doesn't wanna know about
- Amy: DIG came together to fill a need, but no official place to move things forward or make recommendations