



KALAMUNA
Let's Play.

UCSF Faculty Intranet

Discovery Highlights

March 24, 2017



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Let's Play.

About Us

Kalamuna makes the Internet for community-oriented organizations driven to tinker, critique, and change the way things are. We specialize in design, strategy, user experience, and development.

Discovery Project Team



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Overview

The Goal

Provide the insights, data, and direction needed by the **UCSF Academic Senate** to develop an RFP or project brief required for an expanded discovery/design phase and eventual implementation project to build an Intranet for UCSF faculty.

Updated List of Project Deliverables

1. **Discovery Presentation** highlighting the following findings:
 - a. Stakeholder and Faculty/User insights from interviews
 - b. Research resources
 - c. Preliminary survey results
 - d. Preliminary technical analysis
 - e. Recommendations / Next steps
2. **Audio recordings and transcripts** from Stakeholder and Faculty/User interviews.
3. **A Faculty survey** / questionnaire to gather more data than the interviews alone were able to uncover. This survey will likely run beyond the terms of the current engagement.
 - a. Survey will be created and managed using UCSF's Qualtrics system to allow UCSF to maintain it and run their own reports.
4. **Digital Resources Spreadsheet** (as part of an initial technical analysis) for UCSF to fill in and maintain as part of a bigger initiative to audit and create a map of all online sites and resources currently in use.

Insights from Interviews

Stakeholder and Audience Interview Objectives

- Highlight common recurring themes, challenges, and ideas
- Gain better understanding of the current state of online resources at UCSF, and identify Faculty needs, wishes, and any frustrations
- Understand the project scope for eventual implementation
- Determine what next steps may be needed

Interview Methodology

All formal interviews were **recorded and transcribed**.

From these interviews we were able to extract **common challenges** and identify **potential opportunities**.

Note: *Both stakeholders and faculty members we interviewed were considered potential Intranet “users”.*

Also Note: *Quotes in this presentation are not attributed to individuals to eliminate potential for bias.*

Interview Subjects

Interview Subjects

Formal interviews were conducted with 4 stakeholders:

- **Marek Brzezinski**, MD, PhD, Professor of Clinical Anesthesia, Dept of Anesthesia, School of Medicine
- **Mark Seielstad**, PhD, Professor, Dept of Laboratory Medicine, School of Medicine
- **Michael McManus**, PhD, Professor, Diabetes Center, School of Medicine
- **Dan Lowenstein**, MD, Executive Vice Chancellor & Provost

Interview Subjects

Interviews were also conducted with 3 faculty members:

- Interviewee 1: PharmD, MPH, Health Science Clinical Professor of Clinical Pharmacy, Translational - **at UCSF for 16 years**
- Interviewee 2: PhD, Professor, Departments of Pharmaceutical Chemistry and Higher Therapeutics and Pharmaceutical Science (research focused) at the School of Pharmacy - **at UCSF for 44 years**
- Interviewee 3: Associate Professor, tenured, Anesthesia & Perioperative Care - **at UCSF for 15 years**

In addition to the formal interviews, information was also gathered from informal discussions and communications with:

- Alison Cleaver (Senior Analyst, Project PM at UCSF)
- John Kealy (Technical Lead at UCSF, Manager IT Services)

Current State

Current State: **What's Working**

“We have granular web-based solutions that work well...

what's missing is something that ties it all together.”

“I think the IT org has done a pretty good job of moving tools to MyAccess and if you take the time to learn and navigate those tools, they do a pretty good job.”

“I find that most of the resources I need are available if you know where to look. But the places where one needs to look are not static, and thus the challenge is to stay up to date.”

Additional insights:

- Google Search and other Google tools (e.g. Docs, Scholar, etc.) are relied upon by everyone we spoke to.
- Some faculty are creating their own tools, websites, and private networks to address their specific needs.

Current State: Frustrations/Challenges – **Findability of Resources**

“Findability is the main challenge.”

“I don’t think faculty knows what tools are out there.”

“Challenging to find info on policies, training...”

“Many helpful resources exist that people can’t find or don’t know about.”

“A common issue is finding our core facilities at UCSF.”

“I find that most of the resources I need are available if you know where to look. But the places where one needs to look are not static, and thus the challenge is to stay up to date.”

Current State: Frustrations/Challenges - **Trustworthy & Up-to-date Content**

“A lot of similar content in different places - don’t know if it is up-to-date or correct - can’t trust it.”

“It’s out of date and in various different places and may not say the same thing.”

“The ones that are UCSF policy or resource related I find more difficult to find because you don’t always know who wrote the policy, or where to find it. You might pull up 4 websites with different info so you don’ t know which is the right one.”

“When looking to submit for a grant, each school may have their own webpage with FAQ and it may be within one school give you one set of things and another school will say something else. **You don’t always know which one (resource) to believe.**”

Current State: Frustrations/Challenges - **How to do vital things/protocol**

“For applying for NIH grants... **The difficulty is understanding what is needed.** The challenge is finding the right info... you have to ask around to find out who to go to for grant submissions.”

“Advancement or promotion - everybody has to go through it but **for new faculty it's very confusing** - how to make the CV, how to submit the CV...”

“More specific for researchers, we have to navigate how to get post-docs or visiting scholars from other countries... **What kind of info is needed is a mystery to me.**”

Current State: Frustrations/Challenges – **Communication and Community**

“A lot of collaboration happens via email, but there is **too much email.**”

“**... we rely on email and it's become an overwhelming burden...** would be good to have appropriate info sharing without being overwhelmed every day with 100+ actionable emails”

“A jungle of platforms is used for communications - but not used by everyone... Chatter didn't work out.”

“I wish that we as a community could rely on the internet to become informed each day about what is happening here but I'm not sure if that's possible... different habits and practices and interests...”

“We're an urban campus, spread over 4 or 5 major sites - so there isn't a very strong sense of community.”

“**Faculty at UCSF are too siloed: challenges with communication, collaboration, sense of community.**”

Current State: Frustrations/Challenges – **Variety of Users with Different Needs**

“The bigger challenge is that we have people in different places... because often the policies and resources are different.”

- Different schools have particular needs and characteristics that need to be met.
- Individuals have multiple roles and are diverse in their specific needs.
- Difficult to agree on a common platform.

Current State: Frustrations/Challenges - **Calendar**

“A really good consolidated calendar”

- Currently there is no unified calendar to facilitate coordination between schools.
- There are “too many different calendars” between schools and departments, further hampering coordination and scheduling.
- There is interest seeing more interprofessional education across the professional schools - but they don't have the same academic calendar which creates challenges.

Current State: Frustrations/Challenges - **Technical Realities**

“Right now intranet and internet are siloed at UCSF. There needs to be a way to connect info from different silos.”

- Even with MyAccess providing SSO functionality for many tools, multiple logins are still required.
- **Internet connectivity issues and firewalls at different locations hamper collaboration.**
- There are **over 1500 websites** hosted in the UCSF sphere, with more being created all the time.

Wishes, Ideas, & Possibilities

Wishes, Ideas, & Possibilities – **Better Findability**

“Easier linkages with research facilities and resources.”

“Everything linked together in an easy intuitive way - not to replace what’s there - but to make things more findable.”

“I don't think creating a single "web portal" is the answer, since different individuals and sub-communities have different needs and there will never be a perfect "one size fits all" solution. A better approach is to make the existing resources easier to find using standard search engines.”

Wishes, Dreams, and Possibilities - **Up-to-date Consolidated Trustworthy Content**

“Some kind of way to make sure that what you’re looking at is the most recent thing.”

“It would be nice if there was just one place to find the answer - rather than having to click through 10 different places and having to filter them all before getting to your answer...”

Wishes, Dreams, and Possibilities – Common Portal with Real Time Info

“What’s missing is we don’t have a common front page to go to each day to stay informed.”

“...a common portal and more universal usage of communication tools.”

“...instead of 25 different landing pages you have 1 landing page that is up to date...”

“Have a website that brings everyone together and provides some culture and some social angle.”

“Given variety of people, everyone has to be able to personalize it to themselves. Otherwise we will not make people happy.”

“It will be a no brainer - they can open email, see the calendar, schedule work if they need to do it, they can read the paper, they have direct links to HR, research, grants, etc.... So depending on their role they can get what they need.”

Wishes, Dreams, and Possibilities - **Better Community & Collaboration**

“Foster scientific collaboration...”

“Better sense of community across campuses.”

“Raising awareness of activities I wasn't aware of, or learning about people I didn't know about.”

“To see where people of similar interests can come together. So first UCSF but then the wider UC community.”

“Wish that we as a community could rely on the internet to become informed each day about what is happening here.”

“Potential opportunity for collaboration... To break out of that (siloeed) mould would benefit me and the discipline.”

Wishes, Dreams, and Possibilities – Consolidated Calendar

“A really good consolidated calendar.”

“Would like more interprofessional education across the professional schools - but they don't have the same academic calendar...”

Wishes, Dreams, and Possibilities – **Many More Great Ideas...**

“Websites for other programs on campus, including grad student programs, so they could have internet capabilities. And create it in a way that there could be communication (like an intranet) of info that relates to students between different faculty and programs.”

“There needs to be a portal that gives transparency for budgetary info - to track budgetary information between staff and faculty. And the interface should be really easy to use, link Mint.”

“One (challenge) that’s still ongoing is about resource sharing of assets in labs. It would be so easy to have people maintain catalogues online and have it shared. Every lab should be doing this. Then we can connect all the labs and save tons of money.”

“If there was somebody you could actually talk to - a contact person - in each major area (HR, Research, Advancement or promotion) it would be much more helpful.”

Summary

Summary of Interview Findings

1. There are many different types of users with different needs and challenges - but there are also clear commonalities in terms of needs and wishes.
2. Faculty who've been at UCSF for many years have figured out how to do what they need to do, where to look, and who to ask... however, some have expressed that this is a challenge for new faculty members.
3. It's important to reach out to a wider variety of faculty/users, including recent hires, to gain a better understanding of faculty challenges and needs. The survey we sent out was designed to help with this.
4. There are a variety of online initiatives and needs for faculty that are related and need to be addressed. They likely cannot all be met with one solution.
5. There is a common feeling that both schools and even departments are siloed, and faculty feel isolated from each other.
6. "Intranet" means different things to different people.

Summary of Interview Findings (cont.)

Top Needs:

1. Better findability of content and resources
2. Trustworthy up-to-date content
3. Better communication channel(s) (i.e. not email)
4. A sense of community

Solutions related to these needs (proposed by multiple people):

1. Make the existing resources easier to find using a common search engines (e.g. Google). This likely requires optimizing UCSF web pages/sites with metatag information and structured data to improve search outcomes.
2. A common customizable portal page w/ real time info (news and events feeds, email and calendar feeds, common links, etc.) to feel connected and have a starting place for daily activities.
3. Consolidated Academic Calendar (combining all Schools) to facilitate coordination and foster a greater sense of community.

Resources

Research Resources

Transcripts and recordings from Stakeholder and User/Faculty Interviews

Stakeholder interviews: <https://drive.google.com/drive/folders/0BwGtWlBXs-2FX242UWxCZmllOGM>

Faculty interviews: <https://drive.google.com/drive/folders/0Bypgs-o9TXtLZUNoMHdiRE9vd2s>

Additional Resources:

Previous Research

Marek Brzezinski

Info_PreviousResearch_Marek Brzezinski.docx

<https://drive.google.com/open?id=0BwKlvbHEf-fKZW1qdS1pOGxta0U>

Organizing UCSF web infrastructures to save time and money

Michael T McManus – Professor

John Kealy – Web Hosting Manager

UCSF-IntranetMM.pptx

<https://drive.google.com/open?id=0Bypgs-o9TXtLMEdncndhYzJjSmc>

Faculty Intranet Development

John Kealy

Overview - faculty intranet revised.docx

<https://drive.google.com/open?id=0Bypgs-o9TXtLZHJxT2RCVzByLXc>

Re: Rules and Jurisdiction Committee Request/Position on Chancellor's/FAR Funds 2015-2016

Rules and Jurisdiction Committee

4- RJC Final Communication to Senate Chair Greenblatt in re FAR Funds 20....docx

<https://drive.google.com/open?id=0BwKlvbHEf-fKRFpIUdhUC1KenM>

Current Websites

cmbd_ci_web_site-Aug2016.xls

<https://drive.google.com/open?id=0Bypgs-o9TXtLWk1BbmVBcFzXS0E>

Audience Research: Survey

Survey Overview

- After conducting the initial stakeholder and faculty member interviews, we realized more broad coverage was needed to better understand the breadth of faculty needs and frustrations.
- A survey would allow us to gather qualitative and quantitative information from a variety of faculty/users.
- The survey was designed in such a way that if we only got a small sampling of respondents, representing a variety of users, the qualitative nature would still help inform next steps.
- The purpose of the survey was to provide data to inform personas and user stories.
- The survey used neutral language, and did not propose solutions.

Survey Goals

- Understand who the users are (user-types), and what tools and resources they rely on.
- Learn about what's working well, and what's not.
- Give people a chance voice their views/suggestions and collect this insight.
- Find people interested in participating in follow-up research.*

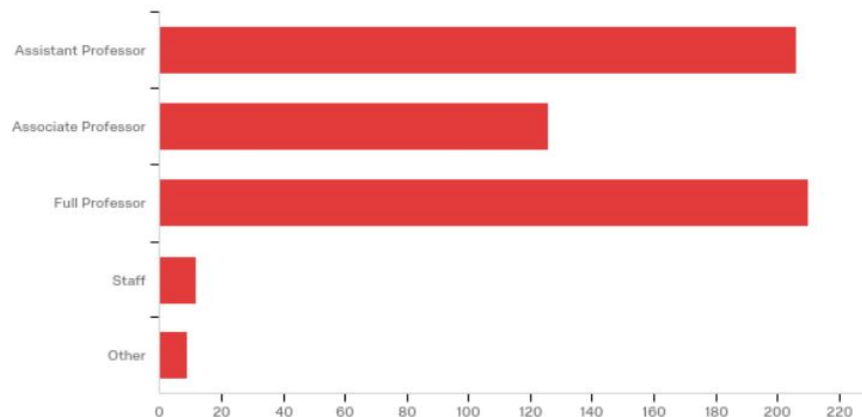
*It's important to include users in the design process throughout the project - this will help ensure that whatever solution is developed will be both relevant and usable for the people who will use them.

Survey Results (to date)

A few highlights:

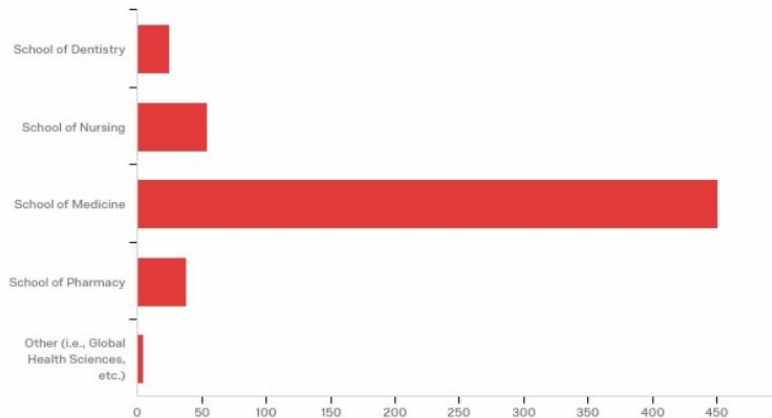
- 560+ Responses (so far)
- Representation from all Schools and Campuses
- Wide range of experience at UCSF (from 6 months to 30+ years)
- >40 Respondents offered to assist with additional research

Q1 - Please select the position that best applies to you:

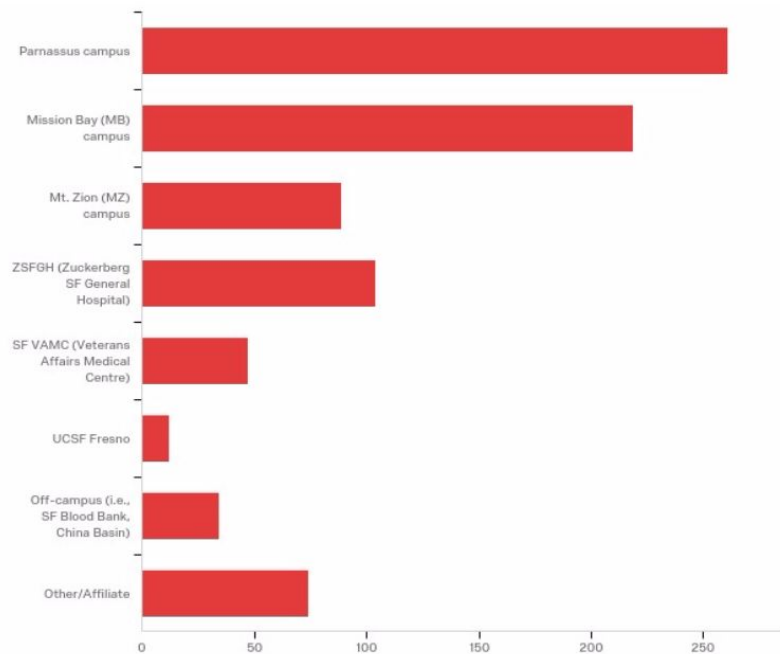


Survey Results (to date)

Q3 - Which School are you affiliated with? (Choose all that are applicable)

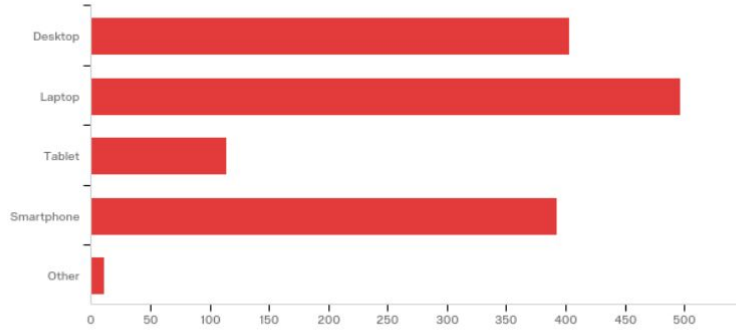


Q6 - Where do you conduct your work? (Choose all that are applicable)

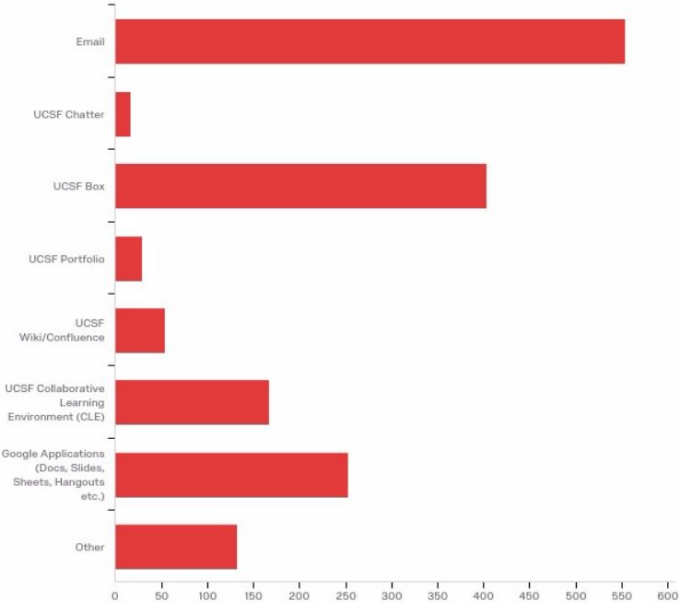


Survey Results (to date)

**Q10 - Which of the following computing devices do you use to conduct your work?
(Choose all that are applicable)**



Q12 - Select the online collaboration tools you use to do your job: (Choose all that are applicable)



Technical Analysis

Preliminary Findings

- Faculty and Staff rely upon a variety of websites and online tools to conduct their work and connect with colleagues and peers.
- UCSF maintains over 1500 websites, on multiple platforms, maintained by many groups.
- MyAccess is a common entry point to a number of important UCSF online tools and services.
- MyAccess' Single Sign-On functionality is a crucial time-saving feature for users.
- An extensive audit of all online resources is required to identify opportunities for integration.
- Currently there is no unified “map” of all UCSF online resources.

Recommended Approach

- A thorough technical analysis involves compiling info from the user research (survey and interviews) as well as current resources listed in the UCSF current websites spreadsheet (see previous Resources slide).
- We've created a spreadsheet to compile this data as it comes in.
- UCSF Academic Senate can input info from survey, with additional help from IT to fill in any gaps regarding technical resources or infrastructure.
- This will provide the basis for a comprehensive online content/resource map which will be a critical component for eventual implementation planning.

Online Resources Audit - Spreadsheet Overview

Resource/Name	URL/Location	Internal or External Audience	Public or Private	Adoption Level	Purpose: Social	Purpose: Collaborative	Purpose: Information	Purpose: Services or Admin	Purpose: Details	Is it working well?	Does it need improvement?	Mobile-Friendly?
MyAccess	https://myaccess.ucsf.edu	internal	private	all faculty and staff	no	no	no	yes	Entrypoint to UCSF online resources and tools that support SSO	yes	yes	yes
UCSF Profiles	https://profiles.ucsf.edu/search/	internal	public	all faculty and staff	yes	no	yes	yes	Professional profiles/bios for all UCSF faculty	yes	yes	no
UCSF Library	https://www.library.ucsf.edu/	internal		all faculty and staff	no	no	yes	no	Main research library for UCSF			yes
UCSF Library - Publishing & Open Access	https://www.library.ucsf.edu/open-access/	internal	both	all faculty and staff	no	yes	yes	no	Info related to publishers and publishing			yes
UCSF Academic Senate	http://senate.ucsf.edu/	internal	public	all faculty and staff	yes	no	yes	yes	Online presence for the Academic Senate which represents all Faculty			yes
Academic Senate newsletter	http://senate.ucsf.edu/2010-2011/asp-02-01-1	internal	private	all faculty and staff	yes	no	yes	no	updates and news about Senate activities and members			no
UCSF CORES Search	http://cores.ucsf.edu/	internal	public	mainly for researchers	no	no	no	yes	equipment and services for researchers	yes	yes	yes

What is it?

Where is it?

Who uses it?

What is it for?

What state is it in?

Next Steps

Recommended Next Steps

1. Compile and Analyze Faculty Survey responses
 - a. Identify and rank Audience Types and Needs (for Personas and User Stories)
 - b. See if there are any wishes or ideas that reveal unexpected solutions/opportunities
 - c. Identify additional tools and resources for the Audit Spreadsheet
 - d. Compile list of faculty/users to participate in further studies
2. Conduct an audit of all UCSF Online Resources (websites and tools)
 - a. Fill in the Online Resources Audit spreadsheet
 - b. Expand upon the format as needed
3. Develop an RFP to find an external vendor and/or create a project plan to develop a solution internally

Questions?



Thank You!

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