

# Internal Communications Design Principles

## Organizational Excellence Work Group

### 2/5/2015

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### **VIII. Appendices**

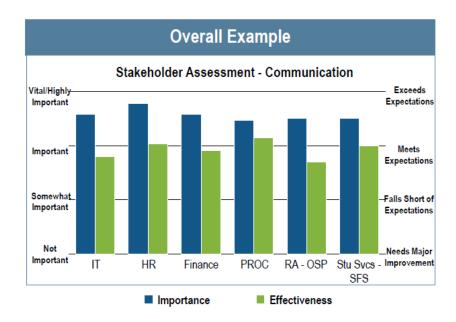
- A. Excerpt from Benchmarking Study of Administrative Services
- B. Excerpt from 2012 Faculty Survey
- C. Excerpt from 2011 Staff Survey
- D. 2014 Internal Communications Survey Data and Analysis
- E. Duke University Collateral Examples
- F. Dow Jones Email Examples
- **G.** Google Analytics Report
- H. Notre Dame: Example of Guidance on Messaging from Managers

### 2014 Benchmarking Study of Six Administrative Functions 2014

### **Communication Observations**

Communication effectiveness can be improved among UVA administrative resources as well as faculty, staff and students to be proactive, collaborative, consistent and clearly articulated

- Clear communications of strategy appear to be lacking across the administrative functions creating frustration within the stakeholder community and lack of clear guidance on the goals of the administrative functions
- Communication was one of the largest gaps in all Stakeholder Surveys
- Enterprise wide scorecards do not readily exist



### **Foundational Recommendation**

• Increase communication with stakeholders with regard to requirements, expectations, statuses and changes to policies and procedures.

### From faculty and staff stakeholders - open responses

### FINANCE: Comment – Customer Service Group

The Finance Organization needs to be centralized for the Health System with communications from Finance to operations being consistent and transparent.

Better communication and training of end users.

Communication with the SOM departments would be a big plus. We are left in the dark when it comes to the financial resources that are available and the decisions that are being made. We run our departmental finances in a void.

Increase communication and be more proactive

It needs to communicate more effectively and seek more involvement from the individuals that have to work within the parameters they impose.

More effective communications

Provide more detailed financial reports pertaining to our organization and be there to answer questions or provided assistance.

Assuming non-finance personnel speak "finance" and become better communicators of why certain controls, policies and procedures are beneficial instead of focusing on enforcement / / Learning to LISTEN and be more responsive and flexible to changing operational needs instead of leading with an "it can't be done like that" or "that won't work" responses

### **HUMAN RESOURCES**: Comment – Customer Service Group

Communicate its strategic positioning.

I think it would be helpful to understand their positioning of services in our day to day business. It is very unclear to me what I should expect from HR. While I know there are efforts underway to attempt to move the organization from administrative to a trusted adviser, they are not there today. Today they seem to only act as a benefits processing organization.

Improve timeliness, communication, and accuracy in dispensing of policy in employee relations cases.

Continue to improve on streamlining communications with a focus on higher quality. The messages were inundating employees for a while and we believe once you hit the threshold, you lose interest. UHR has focused on this aspect of management and I have seen great improvement.

Needs a communications team that can be proactive in demonstrating what goes right. The email messaging to all staff is often confusing.

### **INFORMATION TECHNOLOGY**: Comment – Customer Service Group

Communication has improved recently, but should continue to be the first step in incident management, not an afterthought.

Communicate, communicate and communicate; talk and behave as support entities and resources rather than telling us how things should be done; think horizontally

### **PROCUREMENT**: Comment – Customer Service Group

Better communication.

Finally I find that changes are happening all the time in procurement yet they aren't communicated or discussed at meetings that either I or my staff attend. The staff need to do a better job in letting us know what

is going on.

More communication

More communication to other schools/departments

I think understanding each schools spend and communicating that along with partnering with various administrators to assist in building sales networks would provide us in the field better understanding of Uwide needs.

### **RESEARCH ADMINISTRATION**: Comment – Customer Service Group

Better Communication between Office of Sponsored Programs and Research Units in field.

School is effective-particularly the leadership. OSP needs to be more proactive and communicate more effectively in support of PIs and areas they serve. Have seen improvement over the years. Could be accelerated.

Some staff members need to share information and not keep it all to themselves in terms of regulations - it is sometimes hard to get answers as sometime the answers are treated like big secrets.

Regulatory management is not very helpful, will not answer a direct question, trying to get help is always an awkward dance and involves a lot of guesswork.

### **STUDENT SERVICES**: Comment – Customer Service Group

Better communication

Strengthen communication with SFS and UREG.

Communicate its operations more clearly to other branches of Student Services (including the School registrars) so that we know how to advise or at least accurately direct students towards help with financial aid.

Increased communication of changes in processes, policy, &c with administrative staff in departments.

Provide more thorough information for students concerning blocks, charges, and payments. (This information might already be available through SIS, but students can't navigate the system as well as SFS.)

Let us know how they can help the SOM Departments.

There should generally be more communication and coordination among these three areas, and more communication and coordination between University and School-level branches of each.

### Appendix B

Internal Communications Working Group: Current State Subcommittee 9/11/14

Faculty Senate Survey

The 2012 Faculty Senate Survey was hosted completely on the web. A list of 3,083 salaried faculty members and 865 wage faculty members (included both full time and part time) was obtained from the University's Office of Institutional Assessment. A letter was then sent from President Sullivan announcing the survey and explaining its goals, accompanied by letters from Faculty Senate leaders and CSR Director. The advance mailing was followed by an email invitation to participate in the survey, including a link to the questionnaire itself. A series of follow-up contacts were made to faculty members by CSR to promote participation in the survey.

At the close of data collection, CSR had received a total of 2,102 usable surveys, some of them incomplete. After adjusting for exclusions and a proportional adjustment to estimate the ineligible cases among those from whom we never heard, the survey response rate is 53.7%.

In many cases, the written responses do not give the same picture as that given by the statistical results. To more appropriately interpret the data for each school or subgroup, it is best to read the statistical tables in the report together with the written comments for each school, noting both the number responses to the items along with the numbers of comments. The written comments give context to the tables, and in many cases help explain some of the findings.

Overall the statistical results show that most faculty members (82%) expressed some level of satisfaction with UVA, with almost half being very or extremely satisfied. Note that the crosstabulations and written comments indicate that these opinions vary with different schools and demographic groups. For example, males, faculty over 65, administrators, and those with more than 9-month contracts are most satisfied. The areas with most expressed satisfaction are collegiality, autonomy, and benefits, while the areas with most expressed need of attention are pay, leadership at the dean level and above, communication and transparency, and appreciation/value.

It should be noted that the Overview document, which provided the above information, also did breakdowns of the major areas of concern, but <u>NOT</u> Communication and Transparency.

There is mention of data that is school-specific, but the link on the Staff Senate website goes nowhere, and the corresponding link on the CSR website is missing.

Overall, the communications questions are primarily in the Communications and Transparency section, with one in the Performance Reviews section and one in the Department Leadership section.

The final chart shows that C&T is ranked third most important issue by the faculty in 2012.

### The Executive Summary

This report expanded a bit on the Overview, and included one chart that shows Communication and Transparency have a rating of High Importance and Low Performance.

Table 0-2: Priority Matrix: Perceived Importance and Performance Ratings, 2012.

		Ranked 1	Importance in Needing (Faculty Choices)	Attention
(83)		High	Medium	Low
ce action Scor	High		Collegiality Benefits	Autonomy
Performance Mean Summary Satisfaction Scores)	Performance Immary Satisfact Medium	Appreciation/Value	Departmental Leadership	Diversity & Equal Opportunities
(Mean S	Low	Pay  UVa Leadership (deans and above)  Communication & Transparency	Performance Reviews	

"The grid can be interpreted this way: we see that faculty respondents rated four items high in needing attention: appreciation/value, pay, UVa leadership (deans and above), and communication and transparency. Of those areas, none was rated high in performance by the faculty, though appreciation and value fell into the middle category of performance. That no areas rated high in satisfaction fall into the important area is to be expected, since those areas in which the University is doing well would not be perceived as needing attention. Areas both important and having a low performance rating are: pay, UVa leadership (deans and above), and communication and transparency. Performance reviews were viewed as less important than those items, but also were rated low in performance. Those low performing items can be viewed as the areas needing attention from University leaders."

### Communication and Transparency section:

Table B-10								
Communication and Transparency	Year	Strongly Agree	Somewhat Agree	Neither Agree or Disagree	Somewhat Disagree	Strongly Disagree	Mean	Number Responding
		(%)	(%)	(%)	(%)	(%)		
J1. Changes that affect my work are discussed with me before they are put into effect.	2012	16.1	30.5	16.7	22.7	13.9	3.12	1747
J2. I receive the information I need to do my work at UVA effectively.	2012	22.9	41.1	18.6	12.4	5.1	3.64	1796
J3. I feel free to share constructive feedback with my peers.	2012	31.4	39.2	14.1	10.2	5.0	3.82	(1777)
J4. I am able to let key decision makers know how I feel about things that affect me.	2012	21.4	32.4	17.9	17.2	(11.2)	3.36	(1772)
J5. The time I spend in meetings at UVA is time well spent.	2012	10.8	29.2	22.8	23.8	13.4	3.00	1740
J6. Current university leadership (above the department/unit level) sets the appropriate tone in communication with employees.	2012	16.4	31.2	24.6	(14.7)	13.2	3.23	1670
J7. My chair/supervisor communicates information about matters that affect employees.	2012	36.1	37.1	(13.4)	8.1	5.4	3.90	1767
J8. My ideas are often sought and used constructively.	2012	20.7	31.4	20.4	14.7	12.8	3.32	1766
J9. When I have submitted ideas, I have received feedback and follow-up from others.	2012	20.6	32.4	22.9	14.0	10.1	3.40	1649
	Year	Very Satisfied	Somewhat Satisfied	Neutral	Somewhat Dissatisfied	Very Dissatisfied	Mean	Number Responding
		5 (%)	(%)	(%)	(%)	(%)		
J10. Overall, how satisfied are you with communication and transparency at the University of Virginia?	2012	13.9	37.2	25.2	16.0	7.7	3.34	1790

From the Performance Reviews section:

Table B-6b								
Performance Reviews	Year	Strongly Agree	Somewhat Agree	Neither Agree or Disagree	Somewhat Disagree	Strongly Disagree	Mean	Number Responding
		5	4	3	2	1		
		(%)	(%)	(%)	(%)	(%)		
F4. My chair/supervisor communicates clearly with me regarding my performance.	2012	31.5	27.8	16.4	11.9	12.5	3.54	1702

From the Department Leadership section:

Table B-8								
Department Leadership	Year	Strongly Agree	Somewhat Agree	Neither Agree or Disagree	Somewhat Disagree	Strongly Disagree	Mean	Number Responding
		5	4	3	2	1		
		(%)	(%)	(%)	(%)	(%)		
H1. When making decisions, my chair/supervisor asks for input from those who will be affected by the decisions.	2012	37.1	30.2	10.9	12.4	9.4	3.73	1769

### Part V – Summary of Concerns

Table B-15				
Most Important Concerns or Issues (Respondents were given option to choose up to THREE issues)	Year	Res	ponses	Percent of Cases
		n	Percent	
E. Pay	2012	1149	23.3	63.7
B. Appreciation/value	2012	755	15.3	41.9
K. Communication & Transparency	2012	590	12.0	32.8
J. UVA leadership: Deans and Above	2012	533	29.5	
I. Departmental leadership	2012	355	7.2	19.7
F. Benefits	2012	353	7.1	19.6
A. Collegiality	2012	347	7.0	19.3
G. Performance Reviews	2012	278	5.6	15.4
H. Diversity and equal employment opportunities	2012	219	4.4	12.2
C. Commitment to UVA	2012	132	2.7	7.3
D. Autonomy	2012	132	2.7	7.3
L. The Honor System	2012	97	2.0	5.4
Total	2012	4941	100.0	274.1

### Appendix C

Internal Communications Working Group: Current State Subcommittee 9/18/14

Staff Survey

The 2011 Staff Survey was hosted completely on the web and administered by UVa's own Center for Survey Research (CSR). A letter was sent from President Sullivan via Messenger Mail announcing the survey, followed by an email invitation to participate in the survey, including a link to the questionnaire itself, developed in collaboration by CSR and University Human Resources. A series of reminder emails were sent by CSR to promote participation.

At the close of data collection, CSR had received a total of 3,067 surveys. After adjusting for exclusions and a proportional adjustment to estimate the ineligible cases among those from whom they never heard, the survey response rate is 63%.

Overall, U.Va. Academic Division Staff report high levels of satisfaction with U.Va. as a place to work. The statistical results show that eight out of ten staff members (85.6) expressed some level of overall satisfaction with U.Va., with more than half being very or extremely satisfied. Several intangible aspects of the job, such as the employee's commitment to U.Va. and the dignity the employee feels while performing the job, have a strong statistical impact on overall satisfaction. Employees reported on the survey itself that extrinsic factors such as pay, performance evaluation and opportunities for promotion are most important for the university to work on.

More than two-thirds of Academic Division staff said they were satisfied with communication within the University. Only 9.4% said they were "extremely satisfied" but 24.1% said they were "very satisfied" and 31.2% said they were "somewhat satisfied." 63% say "I usually hear about important changes through communications from my supervisor or management rather than through rumors." However, the lowest rated statement was "the existing communications within the University helps me do my job better", with only 18.7% saying they "strongly agree."

Communication within UVa is of both medium <u>perceived</u> importance and medium performance (see figure below). It was also of both medium <u>derived</u> importance and performance. There were four questions in the communications section, with one in the section about an immediate supervisor and one in the section about University leadership.

Questions and responses are in separate PDF.

		I	Perceived Importance (Employee Choices)	
		High	Medium	Low
ance ince Scores)	High		Work facilities Technology Immediate supervisor	Integrity of employees you work with most Diversity and equal opportunity Your commitment to U.Va.
Performance (Mean Performance Scores)	Medium		Dignity and worth you feel Empowerment you have Employee relations Training and development Communication within U.Va.	Teamwork University leadership Commitment of U.Va. to you
	Low	"Pay and benefits"  Performance evaluations  Promotion opportunities		

Table B-9							
Your Immediate Supervisor	Year	Strongly agree	Agree	Disagree	Strongly disagree	Mean	Number Responding
		(0/)	3	(0/)	(0/)		
Id. My our on door communication		(%)	(%)	(%)	(%)		
I1. My supervisor communicates information about matters that affect employees	2011	39.5	37.4	13.9	9.2	3.07	2814
<b>12.</b> My supervisor asks me for ideas and suggestions for improvements	2011	40.7	33.9	15.1	10.3	3.05	2821
<b>I3.</b> My supervisor acts on employee suggestions	2011	35.3	38.3	16.0	10.3	2.99	2765
<b>I4.</b> My supervisor promotes or shows an active interest in my career development	2011	32.2	34.5	18.7	14.5	2.84	2769
<b>I5.</b> My supervisor provides opportunities to make changes in he way things are done	2011	35.8	37.3	15.8	11.1	2.98	2791
<b>I6.</b> My supervisor is generally available when I need assistance	2011	48.1	35.1	9.8	7.0	3.24	2828
I7. I can provide feedback into the performance evaluation of my supervisor	2011	36.1	27.7	14.4	21.8	2.78	2579
<b>18.</b> My supervisor recognizes me for doing a good job	2011	45.4	35.8	10.8	8.0	3.19	2794

	Year	Extremely Satisfied	Very satisfied	Somewhat satisfied	Neutral	Somewhat dissatisfied	Very dissatisfied	Extremely dissatisfied	Mean	Number Responding
		7	6	5	4	3	2	1		
		(%)	(%)	(%)	(%)	(%)	(%)	(%)		
<b>19.</b> Overall, how satisfied are you with your immediate supervisor?	2011	30.4	29.0	18.6	6.9	7.0	4.8	3.3	5.41	2844

Table B-10							
University Leadership	Year	Strongly agree	Agree	Disagree	Strongly disagree	Mean	Number Responding
		4	3	2	1		
		(%)	(%)	(%)	(%)		
J1. I trust the decisions made by University leadership	2011	16.6	53.2	21.2	9.0	2.77	2658
J2. University leadership sets the appropriate tone in their communication with employees	2011	21.0	54.1	17.2	7.7	2.88	2689
J3. University leadership makes it easier for me to get my job done	2011	13.4	47.6	28.4	10.6	2.64	2468
J4. In my opinion, the actions of University leadership are always ethical	2011	21.9	46.7	22.2	9.3	2.81	2441
J5.In my opinion, University leadership is effectively ensuring a successful future for the University	2011	23.2	53.6	16.5	6.7	2.93	2515

	Year	Extremely Satisfied	Very satisfied	Somewhat satisfied	Neutral	Somewhat dissatisfied	Very dissatisfied	Extremely dissatisfied	Mean	Number Responding
		7	6	5	4	3	2	1		
		(%)	(%)	(%)	(%)	(%)	(%)	(%)		
J6. Overall, how satisfied are you with University leadership?	2011	9.1	25.4	30.2	19.0	10.3	4.0	1.9	4.84	2825

Table B-11							
Communication	Year	Strongly agree	Agree	Disagree	Strongly disagree	Mean	Number Responding
		4	3	2	1		
		(%)	(%)	(%)	(%)		
<b>K1.</b> My job expectations are communicated to me clearly	2011	38.2	44.0	12.4	5.3	3.15	2798
<b>K2.</b> My supervisor or management discusses changes that affect my job with me before they are put into effect	2011	30.2	35.8	19.0	15.0	2.81	2723
K3. I usually hear about important changes through communications from my supervisor or management rather than through rumors	2011	28.6	35.0	21.0	15.4	2.77	2755
<b>K4.</b> The existing communication within the University helps me do my job better	2011	18.7	46.7	24.8	9.8	2.74	2581

	Year	Extremely Satisfied	Very satisfied	Somewhat satisfied	Neutral	Somewhat dissatisfied	Very dissatisfied	Extremely dissatisfied	Mean	Number Responding
		7	6	5	4	3	2	1		
		(%)	(%)	(%)	(%)	(%)	(%)	(%)		
<b>K5.</b> Overall, how satisfied are you with communication within the University of Virginia	2011	9.4	24.1	31.2	14.6	13.1	5.3	2.4	4.77	2809

Table B-21				
Issues Employees Would Like Management to Work on (Respondents were given option to choose up to FOUR issues)	Year	Responses		Percent of Cases
		n	Percent	Percent
A. Working facilities and technology	2011	427	4.8	15.9
B. Employee empowerment	2011	511	5.7	19.1
C. How I feel when I work	2011	401	4.5	15.0
D. The performance evaluation process	2011	995	11.1	37.1
E. Mutual commitment between you and the University	2011	266	3.0	9.9
F. Training and development	2011	574	6.4	21.4
G. Opportunities for promotion	2011	1384	15.5	51.6
H. Teamwork	2011	368	4.1	13.7
I. Immediate supervisor	2011	422	4.7	15.7
J. University leadership	2011	307	3.4	11.4
K. Communication within the University	2011	417	4.7	15.5
L. Integrity	2011	279	3.1	10.4
M. Diversity and equal employment opportunities	2011	219	2.4	8.2
N. Employee relations	2011	401	4.5	15.0
O. Pay and benefits	2011	1968	22.0	73.4
TOTAL	2011	8939	100.0	333.3

Appendix D

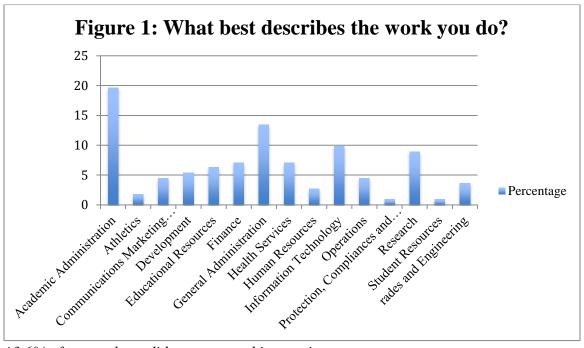
Survey: UVa Internal Communications Overview of Results A total of 208 respondents participated in the survey on internal communication out of the 703 that were contacted, ending with a response rate of 29.59%.<sup>1</sup>

### **Quantitative Analysis**

Weights were created based on the self-identified role of the participant to ensure groups were equally represented and that generalizations are more accurate to the population of UVa employees. Analysis was ran using STATA on the overall population as well as separated out based on role to explore any potential differences based on position at UVa. Findings suggested that there was no large differenced between populations unless otherwise noted in the findings.

### Sample

The sample consisted of a majority of staff or administrative faculty (53.8%), while 29.3% identified as teaching and research faculty, and 16.8% did not respond to this question. There was a large variety of positions available, with most staff or administrative faculty identifying that they were from academic administration (20.4%) or general administration (13.9%). For a complete list of positions, see Figure 1 below. Of those that responded, the majority of participants spent between 81% and 100% of their time in a traditional office environment at a desk (43.2%) and have been employed at UVa for 10-19 years (30.8%) or 20+ years (30.2%).

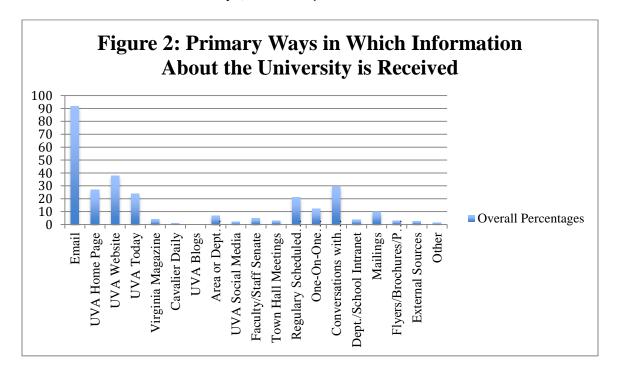


\*3.6% of respondents did not answer this question.

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### Results

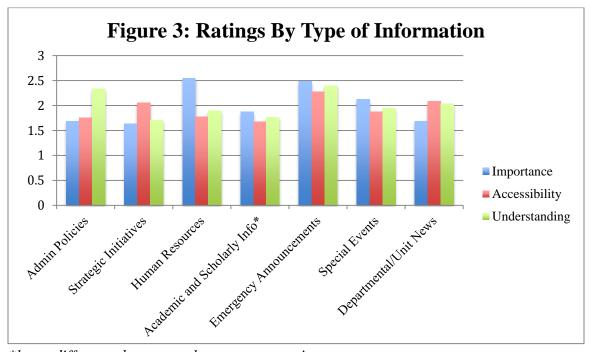
**Frequency of Access.** The primary ways in which information is received about the university is university email (91.68%), though other methods are provided in Figure 2 below. Teaching/Research Faculty and Staff/Administrative Faculty differed in their access to Virginia Magazine (teaching/research more likely), area or departmental newsletter (staff/admin more likely), UVa social media (teaching/research more likely), town hall meetings (staff/admin more likely), regularly scheduled staff meetings (staff/admin more likely), one-on-one conversations (staff/admin more likely), conversations with colleagues (teaching/research more likely) and external sources (teaching/research more likely). Overall, UVa email is accessed by phone or tablet  $(\bar{X} = 1.705)$ , though staff/administrative faculty was more likely than teaching and research faculty to use their desktop/laptop and teaching/research faculty was more likely to use both desktop/laptop and phone/tablet. UVa social media is, on average, accessed by both desktop/laptop and phone/tablet ( $\bar{X} = 3.305$ ), however staff/administrative faculty were more likely to access this through their desktop/laptop and teaching/research faculty were more likely not to access at all. Finally, UVa websites were, on average, accessed primarily by phone/tablet ( $\bar{X} = 1.677$ ), though staff/administrative faculty was again more likely to report utilizing their desktop/laptop. On average, respondents check their email 3 or more times a day ( $\bar{X} = 1.112$ ).



**Providing Input.** Respondents, on average, agreed that, at UVa, we communicate openly about issues that impact each other's work ( $\bar{X}=2.148$ ) and that, at UVa, we discuss issues and decisions to get better results ( $\bar{X}=2.156$ ). When asked if there is an opportunity comment on workplace changes that impact them before they are implemented, respondents were either agreed, or disagreed ( $\bar{X}=2.495$ ). Most respondents agreed that, offered ideas are fully considered ( $\bar{X}=2.327$ ), while they agreed or disagreed that they knew how to share suggested for another department

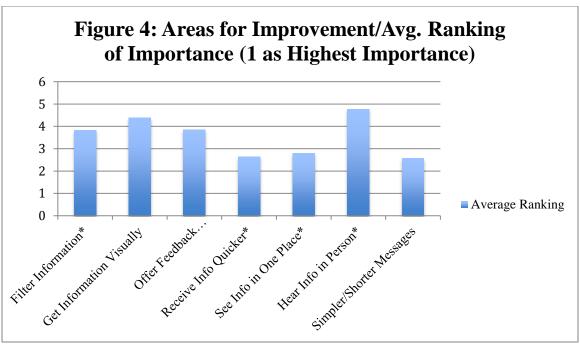
( $\bar{X} = 2.512$ ). Respondents also indicated that they either agreed or disagreed that they felt comfortable sharing ideas or suggestions for another department ( $\bar{X} = 2.451$ ).

**Importance/Access/Ease.** Respondents were asked to rate different types of information on a scale from (1) not important to (3) very important. Specific ratings for each type of information are available in Figure 3. Average scores did not differ based on role, with the exception of academic and scholarly information. Academic and scholarly information was rated as neutral ( $\bar{X} = 2$ ) by staff or administrative faculty, while teaching and research faculty were closer to a rating of very important ( $\bar{X} = 2.475$ ).

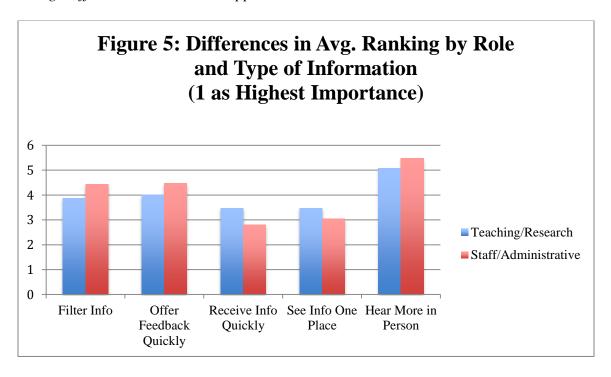


\*large difference between roles appears to exist

Improving Internal Communication. When asked what is most important next step to improve internal communication, getting information visually ( $\bar{X}=4.379$ ), hearing more information in person ( $\bar{X}=4.765$ ), and accessing information in simpler, shorter messages ( $\bar{X}=4.765$ ) were ranked the lowest. Receiving information more quickly ( $\bar{X}=2.632$ ), receiving shorter messages ( $\bar{X}=2.565$ ), and seeing all information in one place ( $\bar{X}=2.793$ ) were ranked of highest importance. See Figure 4 below for a review of all average rankings. Differences did appear to exist based on role, however. Rankings for "filtering information according to preference" were ranked lower by staff or administrative faculty. Staff or administrative faculty ranked "offer feedback quickly and easily" lower than teaching/research faculty, and "hear more information in person" lower. Teaching/research faculty ranked "receive information more quickly" less important, however, and "see all information in one place" was ranked lower. See Figure 5 for role differences.



<sup>\*</sup>Large difference between roles appears to exist

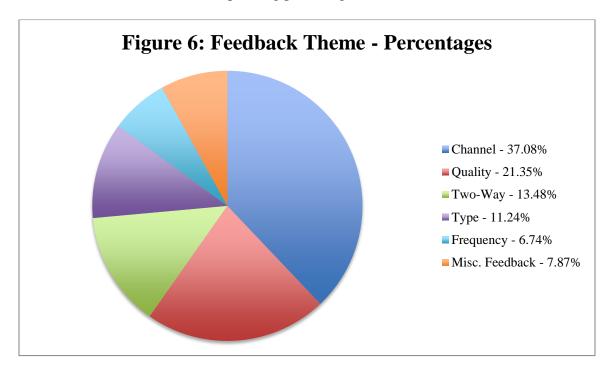


Overall, satisfaction was ranked at 6.344 out of a scale between 0 (very dissatisfied) and 10 (very satisfied). No large differences existed based on role.

### **Qualitative Analysis**

Respondents were asked an open-ended question, "If you could change one aspect about internal communications at UVa what would it be." Of the 208 respondents, 89

(42.79%) provided qualitative feedback to this question. Due to the small sample of respondents, weighting was not utilized in this analysis. The researcher looked for content related to the pre-existing themes of channel, quality, 2-way nature, type, and frequency of communication. During the analysis, however, two additional themes, miscellaneous feedback and miscellaneous – feeling of isolation, were added to the coding scheme. Results indicated that the majority of feedback (37.08%) was regarding the channel of communication and quality of communication (21.35%). Examples of each theme, as well as the corresponding percentage, can be found below.



### Themes

**Channel of Communication.** A total of 33 respondents (37.08%) provided feedback related to the channel of communication. Responses included in this section include feedback such as "Communication and information is decentralized. It would be helpful if there were a central place to locate information."

**Quality of Communication**. Responses to question nine such as "keep it simple, to the point, timely" were coded as quality. A total of 19 respondents (21.35%) provided feedback that referenced the quality of communication.

**Two-Way Nature of Communication.** When a response mentioned the ability to discuss information in a feedback loop, such as the statement "ability to give feedback", it was coded as two-way nature of communication. Of those that provided qualitative feedback, 12 participants (13.48%) referenced two-way communication.

**Type of Communication.** A total of 10 respondents (11.24%) provided responses related to the type of communication. Responses in this theme included

"Improve information on benefits" as well as any reference to the nature of information that is communicated.

**Frequency of Communication.** An example of a response coded for the theme of frequency includes "[e]ven though info coming from UHR is important, I feel that we get too many. i.e. An email about flu shots and open enrollment. Then we get a reminder email." A total of 6 respondents (6.74%) provided feedback that fit within this theme.

**Miscellaneous Feedback.** A total of 7 respondents (7.87%) provided feedback that did not include suggestions for reform, but expressed an opinion. Of these, 3 responses (42.86%) were positive and included statements such as "I feel well informed...no specific recommendations." Four respondents provided negative feedback, such as "Stop me sending me these surveys", however all of these negative feedback responses pertained to the perception of the survey itself and not internal communication.

**Miscellaneous** – **Feeling of Isolation.** Finally, responses that discussed feeling of isolation in the current communication system, such as "[I] work in richmond. i always feel that unless you work on grounds, the university really doesn't care about you. please realize that not every university employee works in Charlottesville" were included in the theme of Miscellaneous – Feeling of Isolation. A total of two respondents (2.25%) responded with information classified within this theme.

Search

GO

### Communications Channels

Communication Services

Comment Guidelines

Other Resources

### Contact Us

Office of Communication Services

705 Broad St., Box 90496 Durham, NC 27705

### email: working@duke.edu

phone:

919-684-4345

fax: 919-681-7926

Staff Directory

### Communications Channels

**Duke Today: Working@Duke:** the primary daily online publication for university faculty and staff offering news, features, videos, polls and other multimedia content.

Working@Duke publication: the primary print publication for all university faculty and staff published every other month.

**Primetime Employee Forum:** a quarterly employee forum where university employees hear from senior administrators – and ask questions about significant issues and events at Duke.

Managing@Duke e-mail: an e-mail to university managers to communicate specific to managers, includes targeted memos as needed and biweekly updates with with short messages and links to more information.

**Human Resources website:** Duke's main employment resource for information about benefits, compensation and classification, recruitment and employment, training, policies, manager resources, and forms.

Ad hoc publications, presentations: design and produce various print and digital materials to support specific objectives; includes materials such as health benefits open enrollment guides, postcards for wellness programs, presentations for managers, and posters for emergency notification.

### Social Media

Facebook – Working@Duke: the Facebook page for Working@Duke, the primary online and print publications for university faculty and staff.

Twitter - Working atDuke: The Twitter page for Working@Duke, the primary online and print publications for university faculty and staff.

**LinkedIn - Working@Duke Group:** The Group page for Working@Duke, the primary print and online publication for university faculty and staff.

YouTube - Working@Duke: the YouTube page for Working@Duke, the primary online and print publications for university faculty and staff.

Flickr - WorkingatDuke: the Flickr page for Working@Duke, the primary online and print publications for university faculty and staff.

# **Duke Today: Working@Duke**

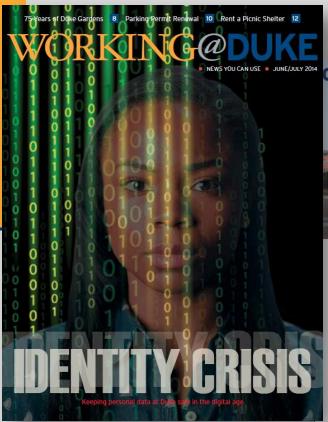


IC Design Principles 42

# **Human Resources website**



# Working@Duke (Publication)





hen Natalie Spring read the email with the first clue in a scavenger hunt hosted by Bull City Burger and Brewery, she acted on a hunch: She paid a visit to the public art sculpture on Parrish Street in

As she walked from her office on Main Street to a meeting several blocks away with Duke colleagues, she stopped at the sculpture of a coat and hat, peered inside the coat flap and retrieved the prize - a small brass bull that would later entitle her to a weekly

"I never would have won that contest if I hadn't been working in downtown Durham," said Spring, a statistician at University Development on Main Street, "Working downtown gives me the hance to combine the energy of Duke with the energy of downtown Durham.

She's not alone. Nearly 2,000 Duke University and Duke University Health System employees from 16 departments work in 13 buildings downtown, up from approximately 50 employee in the early 90s. Duke is the largest leaser of space in downtown Durham, renting approximately 535,000 square feet. In July, Duke signed a contract to purchase its first downtown property, the 93,000 square-foot Carmichael Building, a former tobacco drying

At a gathering of downtown Duke employees at the Durham forming Arts Center in May, President Richard Brodhead and other city leaders thanked Duke employees for their presence downtown.
"You are the urban pioneers and the fuel that keeps downtown
thriving," Brodhead said. "What has happened here is really nothing

short of astounding. We have theater, restaurants and all these amenities that enrich the lives of everyone who lives in Durham, and everyone who works at Duke."

Duke has been a catalyst for many projects that helped revitalize Durham over the past 15 years, including the renovation of the American Tobacco Campus (the largest historic renovation in North Carolina) and the creation of the Durham Performing Arts Center (the largest theater between Atlanta and Washington, D.C.). Durham officials say Duke's presence and partnership helped

the city center recover from what The New York Times described as "a place best avoided after sundown" to a town that placed in the paper's 2011 list of the top 41 places in the world to visit "Duke provided the tipping point," Durham Mayor Bill Bell

said during an interview with Working@Duke. "By bringing a large portion of the workforce downtown, Duke has shown others what the possibilities are. As a result, others are joining the downtown family."

### Changing Downtown's Trajectory

In 1998, Mel Adam, business manager for Medical Center Development, toured the newly built Diamond View Building to scope out the offices where the first large group of employees would move downtown. Looking out the fourth-floor window, he was delighted but dismayed.

"The office had a beautiful view of the new Durham Bulls Athletic Park,\* he said. But beyond loomed one million square feet of the abandoned American Tobacco warehouses with broken

Duke staff talk about working downtown: j.mg/dukeanddowntown

windows and barbed wire fencing symbolizing a downtown struggling against decay.
"It was hard to view moving downtown as a step up in the

world because downtown was so dead." Adam said. The view, and Adam's outlook, changed dramatically with the opening of a renovated 16-acre American Tobacco Campus (ATC)

in 2004 with Duke as one of the first tenants. "We saw ATC as an opportunity to change the trajectory of Durham," said Tallman Trask III, Duke's executive vice president.
"Having an abandoned downtown was not in Duke's interest. Duke needed new space, and we wanted to invest our money where it could make a substantial difference."

But Duke didn't want to overwhelm downtown. To that end, Duke officials told American Tobacco developers they would sign a lease for 100,000 square feet only if at least three for-profit tenants agreed to lease an equivalent amount of space.

"It worked," said Scott Selig. Duke's associate vice president of Capital Assets and Real Estate. "We were the first to sign a letter of intent, but the fourth company to make the formal com-that made building ATC possible."

Duke now leases approximately 225,000 square feet at the American Tobacco Campus for seven Duke departments and share the complex with 72 other businesses and retailers, from Burt's Bees

### Mixing Work and Play

Ben Kimmel, information architect for Duke Web Services, is a regular at the American Tobacco Barber Shop. Once a month, he takes a two-minute stroll from his Duke office overlooking the Lucky Strike water tower stage at the

American Tobacco Campus and settles in the barber's chair for a quick clip. After, he ducks into nearby Mellow Mushroom for a slice of pitza. Kimmel finds mixing work and leisure downtown invigorating.
"I love that there is always a lot of activity here, no matter what

time of day," he said, "And the Bull City Connector makes it really easy to get back to campus when I need to."

On the north side of downtown, Kristina Sigmon, director of

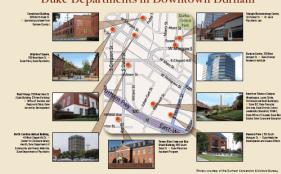
statistical operations for the Duke Clinical Research Institute, is able to enjoy another slice of Durham.

At 6:15 p.m. on a summer afternoon, Sigmon left her office in the Durham Centre and walked two blocks to the farmers market in Durham Central Park to stock up on organic vegetables and goat cheese before the market closed at 6:30 p.m. "I could never make it to the farmers market on time when

my office was over by the hospital," she said.

Sigmon is one of approximately 400 clinical research employee with offices on six floors of the Durham Centre. Working

### Duke Departments in Downtown Durham



4 = Working@Duke

**IC Design Principles 43** 

# **Employee Forums**

Primetime or Working@Duke LIVE Employee Forum

 Employee engagement with senior leaders



# Managing@Duke Email

# Managing@Duke

keeping university managers connected

Manager Update: March, 7, 2011

### Chronicle assessing "Great Colleges to Work For" in 2011

The Chronicle of Higher Education will be surveying 600 randomly selected Duke faculty and staff later this month as part of the "Great Colleges to Work For" program. The program, which is administered by an outside consulting group called ModernThink, was designed to recognize higher education institutions that have created exceptional work environments. For the last three years, Duke has been selected among the organizations that were recognized for best practices and supportive policies. If you or members of your staff are invited to take the survey, please do so. For more information about the survey, <a href="https://tiny.cc/hqh6h">http://tiny.cc/hqh6h</a>

### What would it take to get you to try alternative transit?

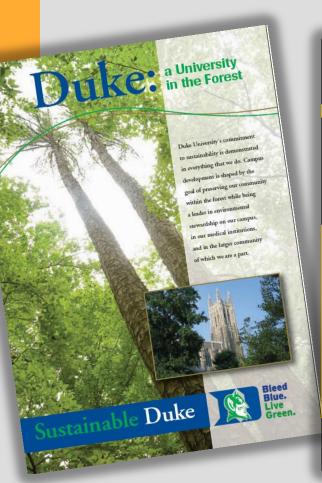
Duke is encouraging members of the community to take GoTriangle's biannual commuting survey with the aim of providing information that can help expand travel choices, enhance safety and improve regional air quality. The 17-question survey takes about five minutes to complete – and participants can win a \$25 Target gift card for their opinions. For more information visit: http://tiny.cc/nbj6d

### Road work along Campus Drive this week

Motorists traveling along Campus Drive by Duke's West Campus should allow for extra travel time next week while crews perform construction to fix cracks in the pavement and fill potholes. For more information, visit: <a href="http://tiny.cc/fd29r">http://tiny.cc/fd29r</a>

Managing@Duke is an electronic memo distributed to university managers to inform, support and enable them to fulfill their supervisory roles at Duke. For more information, visit: <a href="https://www.hr.duke.edu/managers/memos/index.php">https://www.hr.duke.edu/managers/memos/index.php</a>

# Ad hoc publications







E-mail will be sent to all Duke e-mail addresses.

Outdoor warning system may broadcast alerts on campus.

Web and RSS feed at

www.emergency.duke.edu.

Text messages: Sign up at www.emergency.duke.edu.





Direct contact from emergency personnel and managers.





Bulletins and fliers may be posted in buildings.

### WHAT TO DO IN AN EMERGENCY:



**Evacuate** during fires, gas leaks, or major utility failures



Take personal belongings (keys, purse, cell phone, etc.).

Assist those with disabilities Convene in designated assembly points.



Severe Weather: during snow. ice storms, hurricanes, flooding or other

Staff in "essential service" positions



Take Shelter during tornadoes or

Lock or barricade building or room Go to lowest building level, inner rooms, or hallways.

Avoid windows and glass.

Monitor www.emergency.duke.edu or call 684-INFO for updates.

Wait for "all clear" by police or university officials.



Secure the Area if a potential assailant is reported near your location

Tum out lights and stay away from windows.

Wait for "all clear" by police or university officials.

www.emergency.duke.edu

Emergency: 911 • Non-emergency: (919) 684-2444

Introducing DukeWell...



My Health. My Life.

2009 Open Enrollment October 4 – October 14, 2008







# **Communication Channels**

### **Social Media**

- Facebook WorkingatDuke
- Twitter @WorkingatDuke
- YouTube WorkingAtDuke
- LinkedIn Working@Duke
- Flickr WorkingatDuke









# **Emergency Notification**

### **NOTIFICATION DURING AN EMERGENCY:**



E-mail will be sent to all Duke e-mail addresses.



Recorded update at **(919) 684-INFO (4636).** 



Outdoor warning system may broadcast alerts on campus.



Direct contact from emergency personnel and managers.



Web and RSS feed at www.emergency.duke.edu.



Tune in to news media for regular updates.



Text messages: Sign up at www.emergency.duke.edu.



Bulletins and fliers may be posted in buildings.

### Appendix F

### **PRWEEK AWARDS 2014**

CATEGORY: Targeted Audience Awards – Internal Communications Campaign of the Year

TITLE: Dow Jones Informs, Celebrates and Inspires During Transformation

**COMPANY:** Dow Jones & Company

CLIENT: N/A
BUDGET: \$80,000
VENDORS: Up Design

### SITUATION ANALYSIS

In February 2012, Lex Fenwick became the CEO of Dow Jones. He had a vision for the 100-year-old media company: simplify and innovate. It was time for Dow Jones to transform itself into a culture of immediacy, transparency and collaboration.

At the top of the to-do list: reinvent our institutional product business with the launch of DJX (the merging of our major offerings and a completely new business model); amplify our digital journalism platforms; and build a customer service-centric culture.

With great transformation came the need for clear communication amongst Dow Jones' 7,500 employees around the globe. Employees – agents for change and brand ambassadors – needed to be in-the-know about changes within the company in order to fuel the transformation.

Fenwick appointed Paula Keve global head of communications to bring his vision to life. She quickly identified the noticeable gap between internal and external communications. The former was suffering – a staid, disorganized Intranet; lengthy, company-wide emails from multiple mailboxes with no personality or purpose – so Keve made the program her number one priority. In October 2012, she began building out her team, and together they aimed to:

- Establish a 'Voice': All content produced by the team would be succinct and have an identifiable, playful tone.
- Connect the Company: Craft information and opportunities that would encourage collaboration.
- **Provide a Clear Picture of our Products:** Knowledge is power, and in order to reinvent the business employees needed to understand our offerings, our challenges and our opportunities.
- Instill Pride: Produce content that made employees feel proud to be part of Dow Jones.

Within just six months, the team launched a brand new Intranet; a message platform; an event series; sessions on social; and a global philanthropy program with a strong focus on employee engagement.

### **RESEARCH AND INSIGHTS**

To yield strategic guidance, both qualitative and quantitative research was employed. In four weeks, Keve had 40 face-to-face meetings with leadership across the company to glean insights on what changes would spark collaboration and clarity. Based on these in-depth conversations, it was evident that employees wanted:

- Product and department news to keep them updated; and global coverage, not just the U.S.;
- An organized, vibrant Intranet to increase efficiency and engagement;
- Compelling content written in casual non-corporate speak that's up-to-par with the company's award-winning journalism.

The takeaway: the combination of these needs – if addressed – would create a workforce that felt proud, efficient and connected at Dow Jones.

Keve's team took the lead on surfacing data on the only available communications outlet available at the time – the Intranet. Built on SharePoint, employees had the ability to upload documents wherever they wanted, whenever they wanted – resulting in highly disorganized pages with outdated information that made it difficult for employees to get the information they needed, fast. The news articles on the homepage also did not allow employees to comment and the content was copied and pasted from whoever submitted it. Therefore, there was zero opportunity for engagement and no consistent 'voice'.

Between January and May of 2013, the statistics on the Intranet showed:

- An 18% decrease in unique visitors
- A 10% decrease in visits (going to more than one page)
- The top pages changed from month to month, indicating a lack of consistency

With this information in mind, the team spoke to dozens of employees who expressed frustration about the density of the site and the inability to surface information. The team hired a design agency and as wireframes were created, the team held three focus groups with employees. Their suggestions shaped the decisions of what would eventually become "DJ Hub," and influenced the launch of brand new communication outlets.

### **STRATEGY**

At the core of our creative efforts: developing the Dow Jones 'voice.'

The internal communications team would consider itself a group of internal reporters who had their fingers on the pulse of all-things-Dow Jones. Constantly cultivating news from every department and every location was just the first step. And not just any news – news that would be informative and inspirational.

Taking that news and packaging it in a consistent, succinct and playful tone was of utmost importance. In a world where people are inundated with information, we wanted to craft content that 7,500 people looked forward to. The content, ranging from informative (ex: the latest product updates) to inspirational (ex: the biggest institutional sales win of the month), would always share the same tone. That tone would be the antithesis of dry, corporate speak – it would be likened to an award-winning blog that has such a definitive, inviting personality that people want to stop in and read what's going on. By finding the best content and packaging it in this way, we would champion the quality and heritage of our products in an edgy, contemporary way that would leave employees feeling proud.

No matter the communications vehicle, the voice would prevail.

That's no easy feat in a company where the roles run the gamut – from the veteran Wall Street Journal reporter in New York to the young college grad on the customer service team in Hong Kong to the lawyer working in Paris. Developing a voice that would resonate with all employees was part of the challenge.

But we did it.

### **EXECUTION AND TACTICS**

With the voice developed, we created new outlets to share our content.

New Intranet: Starting from scratch on WordPress to launch "DJ Hub," there are three major improvements: I) the homepage news is displayed in a blog format; the content is written by the team; and employees are encouraged to comment; 2) the look and feel is vibrant and on-brand; and 3) the team organized all information into a one-stop-shopping format to improve efficiency. The team also re-wrote all product and department descriptions in the 'voice.'

- Message Platform: In addition to the content on DI Hub, we developed three key communication vehicles:
  - **DJ Communications:** Email system where our content limited to 140 words or less is presented in one of numerous templates that are indicative of the message: To Know, To Do, <u>To See</u>, To Enjoy, To Win, To Give. The emails are delivered with clever subject lines designed to intrigue.
  - The Lead: Digital magazine published once a month that contains our top content with feature-style, in-depth reporting on DJ activities and people, packaged in a sleek, shareable format. The content is hosted on an external site, so employees are encouraged to share it through social media.
  - Dow Jones Today: Utilizing our own product (Factiva) employees get a succinct daily snapshot via email of external news including coverage of our business, competitors and topics of interest.
- Event Series: Launched "DJ Day" in New York, London and Princeton. Employees test out products in beta mode, provide feedback and meet those in different departments.
- Sessions on Social: With employees being informed, it was important to get them sharing our content outside Dow Jones' walls. A member of the comms team single-handedly runs a Twitter 101 course for staff.
- Global Philanthropy Program: Local volunteering opportunities are coordinated for groups of employees across the globe, from New York and London to Mumbai and Hong Kong.

### **EFFECTIVENESS AND RESULTS**

Dow Jones' internal program has made an impressive impact in a short period of time – and we have the facts and feedback to support it.

### New Intranet

- Blog posts have garnered as many as 30 comments;
- Focus group yielded overwhelming positive feedback in terms of efficiency and overall look and feel;
- Time spent on the site continues to increase an average of one minute each month;
- Daily unique visits range between 3,000 5,000.

### Message Platform

### DJ Communications

- Average open rate of 60%
- Contests held via "reply to this email" have garnered up to 300 responses \*these are generally local opportunities so emails aren't sent to more than ~2,500 people at a time

### The Lead

- Each issue averages over 2,700 opens and has an average open rate of 32%
- Employees ask to be featured and share news with the team for inclusion
- Feedback from leadership:
  - "Just wanted to drop you a note to say that I thought this month's edition was your best yet. And really think it is hitting its stride. Well done to you and the team."
  - "You make magic happen every month. This looks fantastic!"

### Dow Jones Today

Average open rate of 45%

### Event Series

Over 200 employees attended in each location

### Twitter Sessions

Went from 35 corporate staff to over 400 on Twitter, including 24 executives and our CEO.

### Global Philanthropy Program

Watch this.

See http://awards.prweekus.com/dow-jones-informs-celebrates-and-inspires-during-transformation for images of Dow Jones' award-winning portfolio

# Google Analytics at the University of Virginia:

A Change Request
in Pursuit of
Organizational Excellence



Submitted by

the uWeb Steering Committee

January 2015

### **Proposal Summary:**

We request a UVA policy change whereby someone in authority—for example, the President, Provost, COO, or Board of Visitors—acts as an executive sponsor to sanction the use of Google Analytics (GA) at the University.

This could be as simple as an **announcement that using Google Analytics in its free Standard Edition is permitted**, *or* as complex as negotiating a contract with and **funding the University's purchase of Google Analytics Premium Edition**. Either way, we make this request to:

- Facilitate an exceptional University presence online which strengthens the UVA brand by providing business intelligence to UVA employees who maintain, design, or develop University marketing communications, websites, and apps
- Enable University leaders and managers to measure and monitor impacts of UVa websites, email marketing campaigns, social media outreach, e-learning initiatives, etc. and make decisions around these efforts based on metrics
- Eliminate the existing organizational culture where fear of publicly acknowledging use of GA stifles dialogue, training opportunities, and acting upon data-driven insights
- **Reduce the liability borne personally** by UVA Web developers, designers, and communicators in the course of fulfilling their daily job duties

#### **Contact & Sponsor:**

This proposal is brought forth by the uWeb Steering Committee, elected representatives for the uWeb community, an organization of website developers, designers, contributors, and communicators at UVA seeking to provide opportunities for cross-Grounds collaboration and professional development.

## Why UVA Needs Web Metrics

Goals necessitate measurement. An organization as large and diverse as the University of Virginia has a wide array of business goals to fulfill by executing strategies across many different digital platforms. These include websites, email marketing campaigns, online advertising, search engine optimization, reputation management, social media engagement, app development, e-learning initiatives, and more.

Without a proper system to evaluate the success of these online strategies or to collect, interpret, and act upon website performance statistics, UVA is at a significant disadvantage as compared to peer higher education institutions. We therefore have a mission-critical need for data to inform our decision-making in the digital sphere and a measurement system that can help us identify and build upon successes.

In other words, we cannot operate online and expect to know whether UVA's digital efforts are succeeding unless we are measuring our online performance.

The ability to make thoughtful, data-driven choices concerning the University's Web presence—both the main UVA website and those of its units, schools, and departments—aligns with both the University's strategic plan and its focus on organizational excellence. Such data enables us to maintain a Web presence worthy of a world-class university, plus:

- Strengthen and unify the UVA brand;
- Attract the best students and faculty by making the UVA website an engaging, user-friendly, global gateway to the University—as it is the initial and often the final "touchpoint" that many have;
- Improve the online experience of all our audiences, including prospective students, parents, donors, employees, and the larger community.

## Why Google Analytics?

Google Analytics is a mature, Web-based metrics service offered by Google that generates detailed statistics about online performance. It can track where website traffic originates—i.e., referral sources such as search engines and shared links on social networks—and can measure the popularity of links, time spent on pages, and website entry and exit points. It also offers information about typical audience usage of mobile, tablet, and desktop platforms, types of Web browsers used, click-through paths, numbers of new versus returning visitors, common search keywords, and more. GA provides real-time monitoring and vital business intelligence.

Armed with this knowledge, website managers and communicators can make informed decisions about what content their audiences are searching for, what content their audiences most value, and how their audiences locate, access, and share it. This information equips them to ensure visitors have the best possible online experience.

Google Analytics (GA) is not only the industry standard for Web metrics, but also the global market leader, universally regarded as the tool of best practice among Web

developers, managers, and communicators. No other system comes close to its rich feature set, overall capabilities, and widespread adoption:

- More than 17 million websites use Google Analytics, and with 81% market share, GA is the world's most widely used website statistics service. 1
- About 97% of American colleges and universities use GA on their sites as well.<sup>2</sup>
- Since whether an organization uses GA is evident through viewing the publiclyavailable source code of its website, we know that **virtually every state government and public higher education institution website in Virginia uses Google Analytics**.<sup>3</sup>

### A Brief History of Google Analytics at UVA

Google	GA disallowed	Google discontinues	UVA
buys Urchin,	at UVA, so	Urchin, pushing users to	debuts
a GA	some departments	either use GA's free	Organizational
competitor	switch to Urchin	or paid versions	Excellence
		Ī	
2005	2008	2012	2014

Google Analytics had already emerged as the industry standard for Web metrics by 2008, but was discouraged at UVA on advice of General Counsel, Procurement, and former President Casteen. Legal liability, indemnification, and privacy concerns were cited as problematic. To comply, several University departments then halted their use of GA. Some switched to a paid account with Urchin (which permitted local, rather than remote, hosting of data), in order to maintain access to robust Web metrics.

Unfortunately, Google also owned Urchin, having purchased it in 2005, and decided to discontinue it in 2012. This effectively nudged its Urchin users to default into using the free Google Analytics Standard Edition, or into paying for its new GA "Premium Edition," which debuted in 2011—for a cost exponentially higher than Urchin's former pricetag. Out of options with Urchin's demise, most UVA schools and units have been using GA's free Standard Edition since at least 2012, although many hesitate to publicly admit it.

 $<sup>^{1}</sup> Sources: \underline{http://www.quora.com/Google-Analytics/How-many-users-or-websites-are-using-Google-Analytics} \ and \underline{http://w3techs.com/technologies/overview/traffic analysis/all}$ 

 $<sup>^2</sup> Source: \underline{http://collegewebeditor.com/blog/index.php/archives/2012/06/04/the-2012-state-of-social-media-and-web-analytics-in-highered-survey-report/$ 

<sup>&</sup>lt;sup>3</sup> Our research found that <u>VA Tech</u>, <u>William & Mary</u>, <u>Mary Washington</u>, <u>JMU</u>, and <u>virginia.gov</u> itself all use GA. In addition, <u>Chesterfield Co. received a Governor's Technology Award in 2010</u> partly because of its use of Google Analytics.

Over the past couple of years, public discussions about GA and the lack of a central UVA Web metrics system have appeared occasionally on University email listservs. Posts typically question the not-well-understood "policy," since it has never been formally posted anywhere by any University entity (as far as we could find in our research). Rather, the "ban" has been communicated and repeated solely by word-of-mouth.

In the summer of 2013, UVA established the Organizational Excellence program to make a formal, deliberate, University-wide effort to enhance organizational capacity and advance excellence. Becoming more data-driven and results-oriented are among the guiding principles of this initiative, which seeks to align processes and technology to support institutional priorities. With a focus on streamlining, reducing duplication of effort, and eliminating non-value added activities, Organizational Excellence dovetails naturally with the spirit in which we now bring forth this Google Analytics policy change request.

### Why Should Things Change?

Most of UVA is already using GA, but not necessarily effectively. Given the history and confusion surrounding this issue, many UVA Web practitioners are reluctant to discuss GA publicly. Most fear that doing so might risk access to essential data for their office, department, or school. Many are also concerned about job security and bearing any potential liability personally. The result has been an awkward "don't ask, don't tell" environment around GA at VA. Organizational silos and duplication of effort result:

- Web developers and communicators both in the main UVA communications office and at various schools and units all have their own **separate GA installations**. They do not collaborate with each other on customizations or techniques to maximize the value of GA data while minimizing any security or privacy concerns.
- Many such employees feel they cannot freely share insights gained from GA or best practices with one another, nor pursue training opportunities that would improve their ability to effectively leverage it.
- Instead, they use GA metrics to generate reports for supervisors and management, who typically read and act upon them without acknowledging (or even realizing) the data source. Rarely does anyone publicly discuss use of GA (outside of a handful of times it has come up on UVA listservs), mainly to preserve access to its essential data for decision-making at all levels.

Employees facing litigation may not be supported by UVA General Counsel. Many UVA Web developers, designers, and communicators are asked—quite often implicitly and occasionally explicitly—to collect, analyze, or report on Web metrics as a measure of employee accomplishments or to inform decision-making around organizational websites. Some UVA job descriptions even list this as part of the position responsibilities.

- Such employees are effectively **required to use GA to fulfill their job duties.**Many are happy to do this, yet currently do so knowing that they may not have the full support of the University whose mission they are trying to advance.
- University Counsel has indicated that these employees are on their own should any problems with end-user agreements ever arise, essentially asking them to bear all potential liability personally.<sup>4</sup>

### Ways to Move Forward

When the uWeb steering committee took this issue up on behalf of its membership in early 2014 and contacted UVA General Counsel for input, the same privacy and indemnification issues were raised again, and the official position on GA was reiterated.

University Counsel has never addressed the Premium Edition option, however, which turned up in our research for this document. GA Premium might accommodate the University's privacy policy and contract terminology needs—for a price.

In sum, to improve the current situation, UVA has three choices:

- endorse the use of the free GA Standard Edition already in use;
- purchase the GA Premium Edition for the enterprise; or
- move UVA to another sanctioned analytics vendor—in the unlikely event that one comparable to GA in performance could be located and funded.<sup>5</sup>

Any of the above would enable UVA to join its fellow institutions in the state and nation in freely leveraging Web metrics as part of an overall focus on branding and in pursuit of organizational excellence. Specifically, it would enable us to:

- create a flagship Web presence worthy of a world-class university;
- foster a better, more consistent user experience for online audiences;
- craft more strategic digital marketing and communications;

<sup>&</sup>lt;sup>4</sup> Direct quote from UVA Associate General Counsel, in an email to the <a href="webmasters@virginia.edu">webmasters@virginia.edu</a> list, on April 25, 2013: "Under UVA policy any 'OK' you provide to one of these frequent web-based licenses is being done on your own and as individual, unless you send the agreement to UVA (or Medical Center) Procurement for their review and approval...

This is true whether the contract is for services or goods that are 'free' or for which payment is required. These online license agreements typically have terms the University could not agree to as a public entity, for example 'indemnification' terms or agreeing to the jurisdiction and laws of another state. Often when Procurement gets such agreements, they are able to get the vendor to agree to necessary changes. If you, however, sign them as is, you are agreeing as an individual to indemnify and to be sued wherever the vendor stipulates. This may not typically be a big practical problem, as it's unusual for people to get sued under one of these web-based agreements. But it isn't impossible--something each person truly needs to think about [underline not added; in the original]...Even if you decide to go ahead and 'click ok,' you'll have a better understanding of the personal responsibilities you are agreeing to, first."

See the addendum at the end of this document for a listing of Google Analytics competitors and their pros and cons.

- ensure more effective handling of Web data, University-wide; and
- liberate UVA Web practitioners to seek training in this essential tool and to speak openly with one another about their work.

### **Options & Implications If...**

### Option *a*). Proposal is approved and GA Standard is officially permitted.

With support from UVA senior leadership, University Counsel could consider this system an exception to the general click-through agreement rules held currently—or revisit the click-through issue entirely—since so many UVA employees working in the digital sphere *must* agree to many click-throughs in the course of their daily work for the University.

#### • Pros:

- o GA Standard Edition is already in use across virtually all UVA and other state institution (both higher ed and government) websites.
- o Many University deans, department heads, marketing and communications officers, etc. have indicated at least tacit approval of GA use by regularly collecting its metrics and using the resulting data to make decisions armed with solid business intelligence. In the current climate, most find it uncomfortable to express this publicly, however. Officially permitting GA Standard would free these leaders and managers to discuss openly the insights they gain from GA data, to collaborate together, and to leverage these insights at the school and department level more effectively.
- Approving GA Standard would also ensure all UVA website developers, designers, and communicators feel comfortable exchanging best practices and seeking access to GA training, acting upon GA metrics, and focusing on maximizing strategic, thoughtful use of GA data at the University.
- GA Standard Edition is the most inexpensive tool available—being free of charge—yet also the most robust and standard in the industry.
- Since 2010, GA Standard has <u>supported anonymized IP addresses</u> to allow site owners to comply with privacy policies and protect users' identities.
- Additional advantages: If the University could reconsider use of GA, perhaps other UVA Google services could also be revisited and permitted too.
  - In order to improve website rankings in search engines, webmasters must leverage Google's Webmaster Tools. Yet UVA webmasters are forced to use their personal, non-University Gmail accounts for this work. (While ITS does offer a UVA Gmail service, General Counsel and Procurement have instructed ITS to block UVA Gmail's access to

- many Google Apps, including GA and Webmaster Tools—plus YouTube, Picasa, Google Hangouts, and more—not for any technical reason, but for the same reasons GA has been prohibited.)<sup>6</sup>
- This limitation essentially forces University Web developers and communicators to conduct significant business on behalf of the University using their personal, non-UVA email accounts, in direct violation of <u>UVA's guideline against use of personal, non-UVA email services</u> for employees in the Academic division.

#### • Cons:

- Potential legal issues brought up by University General Counsel related to state laws, indemnity, and liability. These would have to be examined and discussed by General Counsel once it is clear the approval is coming from UVA's most senior leadership. Privacy policies may need to be updated where posted on UVA websites.
- o These concerns may be mitigated by the fact that most if not all Virginia state schools, governing bodies, and organizations (including <u>virginia.gov</u>) already use GA on their websites, as do virtually all other peer higher ed institutions, including as noted previously.

#### • Cost/Resources:

 Very few resources required, as GA Standard is free of charge and many UVA employees already know how to use it at a basic level

### Option *b*). Proposal is approved and GA Premium Edition is purchased.

UVA funds and negotiates a contract for the use of Google Analytics Premium Edition at the University. All UVA-owned GA Standard accounts currently in use for the various schools, business units, and departments could be rolled together under this umbrella, and any future GA accounts needed for UVA Web developers or communications professionals would be covered under the Premium contract. GA Premium offers "data you own and fully control."

<sup>&</sup>lt;sup>6</sup> Procurement has said that as a state institution, UVA is legally restricted from accepting certain types of liability and Google's Terms of Service for these Apps have issues that the University legally cannot accept. However, if UVA *could* manage to allow these Google Apps, the entire UVA community would absolutely welcome the news—not just webmasters, but students and alumni too (the primary users of ITS's UVA Gmail service)—as exemplified in this sample comment received from a student via the CIO Survey in June 2013: "Can you please turn on all google apps features. I know it is possible in the control panel, and it would help me and a lot of other students to be able to use other google apps with our uva logins. Literally one of the most frustrating things having to log out of email and everything to open up apps like analytics and youtube."

#### • Pros:

- o GA Premium Edition allows for contractual specifications and modifications that will likely satisfy the indemnification and privacy concerns General Counsel has raised with the Standard Edition. Specifically, it would give UVA the opportunity to negotiate a custom Terms of Service with Google to ensure data collection and storage is conducted in a way that is in line with our University privacy policy and any state legal requirements.
- Negotiating a custom contract with Google for GA Premium might provide a natural opportunity to revisit the UVA Gmail Terms of Service as well, so its currently blocked features could be enabled. This would allow UVA Web practitioners to conduct University business with Google (i.e., promoting the findability of UVA websites in search engines) while using their University Gmail accounts, rather than their personal email accounts, in violation of the aforementioned <u>UVA guideline against use of personal email services</u> for employees.
- Since GA is already in use across virtually all UVA websites, costs could be shared internally, proportionate to users, per the new financial model.
- The upgrade from Standard to Premium Edition would minimize loss of historical data (as compared to switching vendors entirely) and provide a familiar user interface for UVA developers, designers, and communicators.
- GA Premium Edition provides full feature support and training, offering UVA Web developers and communicators customized guidance and consulting to ensure website visitors "convert" to realize UVA's online goals.
- o A GA Premium contract would free University deans, department heads, etc. to publicly acknowledge insights gleaned from GA yet feel confident that the data they are acting upon is well-safeguarded and their employees would not be held personally liable in the unlikely event of litigation.
- o Like GA Standard, GA Premium offers <u>anonymized IP addresses</u>, which may mitigate privacy concerns.

#### • Cons:

- o GA Premium is offered a non-negligible price. It is an annual fee that is not in any budget, so would necessitate significant funding and consideration.
- Concern over the high cost of GA Premium could be mitigated by the fact that <u>UVA Procurement's Guidelines for Competition</u> include a "Sole Source policy," which is that when only one firm can satisfy a requirement, price is not a factor in vendor selection. In many ways, GA Premium Edition really is the sole source for the robust Web metrics data that the University needs to compete, gathered and stored in a way that UVA Counsel can support.

#### • Cost/Resources:

- o A flat fee of \$150,000 for the entire University each year
- Negotiating the Premium contract may take significant time and resources
- Once established, some transition time will be required to move the accounts of UVA Web practitioners from GA Standard to Premium

### **Other Options:**

Option *c*). UVA evaluates metrics systems across the board and selects one that meets our privacy requirements and legal constraints in a contractual agreement.

#### • Pros:

One University-wide system, with clear approval and support from UVA
 Counsel, would reduce silos and open lines of communication among UVA
 Web developers and communicators, increase knowledge sharing, and
 promote greater focus on data-driven decision-making in the online sphere.

#### • Cons:

- Analytics competitors to GA are typically costly, subpar, or both. They tend to be either somewhat robust but very, very expensive—or free, yet lacking most functionality.<sup>7</sup> Interactive design, digital marketing, and Web design firms such as <u>Viget</u>, <u>NewCity</u>, and <u>Digital Pulp</u>—all industry experts—view GA as the clear market leader for Web metrics in the enterprise.
- o Historical data will not transfer from GA to a new system. Schools and units will be forced to have separate data that most likely will not line up between GA and any new analytics program. Any previous metrics, reports, or goal deliverables may be severed with this transition, which causes serious concern for all who currently rely on GA data for reporting.
- High switching costs, with significant impacts in terms of time and labor for offices and departments to implement new code, replicate old reports in new systems, and locate any lost functionalities or capabilities, if possible.

#### Cost/Resources:

 Possibly high licensing expense, depending upon the system chosen, and likely in exchange for a less robust tool than (free) Google Analytics

<sup>&</sup>lt;sup>7</sup> In preparing this document, the uWeb Steering Committee researched several of Google Analytics' top competitors to see if another could match the functionality and richness of Web analytics offered by GA. We <u>found a comparison</u> <u>website which provides detailed information on GA and its competitors</u>, scoring the systems on functionality, privacy, and maturity. GA ranks extremely highly in all categories. See also the addendum at the end of this document for more.

### Option *d*). Change request denied: UVA clarifies existing position on GA.

UVA does not accept the legal risks associated with the use of GA Standard Edition, nor pay for the GA Premium Edition, but does at least communicate clearly about Google Analytics to its employees.

University employees who use GA metrics in the course of maintaining, designing, or developing UVA websites, apps, or marketing communications need to be made aware that by using it, they have agreed to its "click-through agreement." This means that if they choose to continue collecting, using, and acting upon GA data, they are doing so *at their own risk* and University Counsel will not provide support to them in the unlikely event of litigation.

UVA Web practitioners (and their supervisors and managers) need to be aware too that they are *not* free to pursue University-funded training and professional development opportunities in best practices and security for Google Analytics.

#### Pros:

- UVA posts an official, clear statement through an official channel that it does not condone use of GA, clarifying an issue which has been murky for years.
- o UVA still enjoys better positioning in the higher education market—reaping the benefits of GA without having to assume its potential risks at an institutional level—because many UVA employees are so dedicated they are willing to assume personal liability just to preserve access to GA's essential data. Many employees feel that litigation is highly unlikely and that metrics are so vital for decision-making in their offices that the gamble is worth it.

#### • Cons:

- UVA Web developers and communicators would continue to bear personal liability for the work they do for the University.
- o If, after learning more about UVA's official position, any employees decided to halt their use of GA to protect themselves from liability, supervisors and senior leadership in their schools, departments, and business units would be forced to make decisions about UVA websites, marketing campaigns, search engine optimization, etc. without Web metrics and historical data.
- UVA may struggle to attract talent in Web-related positions if it becomes widely known that employees are not "allowed" to use an industry standard tool in widespread use at other universities and in the private sector.

- UVA employees could not obtain University-funded training that would assist them in maximizing the value of GA data while minimizing any security or privacy concerns.
- UVA Webmasters would have to continue conducting business on behalf of the University using personal, non-UVA email accounts, in direct violation of <u>UVA's guideline against use of personal, non-UVA email services</u>.

#### • Cost/Resources:

- Since multiple disparate installations of GA would likely persist, so would lack of coordination and collaboration among UVA employees using GA.
   Presumably, this leads to duplication of effort, continued silos, and less effective use of the tool overall.
- Spotty and ineffective use of Web metrics will foster undetected and unresolved issues with UVA websites and online marketing and suboptimal setup to facilitate the reaching of University goals—all ultimately leading to a potential loss of UVA revenue and/or reputation.

### **Requestor's Final Recommendation:**

The uWeb Steering Committee recommends Option *a*)—permitting use of the free Standard Edition of GA—for maximum University benefit at minimum cost, both in terms of labor and time. However, Option *b*) would also be welcomed and appreciated and would likely address the potential issues involved with GA Standard.

Either would signal the University's support for the employees who utilize GA to manage the University's image and presence online every day.

### **Support for this Request**

Last fall, the uWeb Steering Committee <u>posted this document online</u> to solicit feedback on it from our members. We also gave a presentation at the Fall LSP Conference to discuss the issue, gauge whether this petition accurately represented sentiment around the University, and invite input from our community. Between our online form (which allowed people to "sign" this petition digitally) and the dialogue and follow-up conversations that occurred after that event, we believe this document accurately reflects the historical and current situation regarding GA at UVA.

We have gathered ~50 signatures from schools, departments, institutes, and business units around the University in support of this petition. Supporters range from Web developers, programmers, and IT analysts, to communicators, marketers, and social media professionals.

Signed by, the 2014 uWeb Steering Committee:				
Valerie Harness, Web & Social Media Manager UVA Darden School of Business				
Jonelle Kinback, Senior Project Manager & Web Programmer University Communications Office				
Lauren McSwain-Starrett, Senior PR & Marketing Specialist UVA Information Technology Services (ITS)				
Ray Nedzel, Webmaster UVA School of Medicine				
John Rhea, Webmaster UVA Curry School of Education				
Ted Gayle, Local Support Partner (LSP) Program Coordinator 8 UVA Information Technology Services (ITS)	k ex-officio member			
respectfully submitted on thisth day of	, 2015.			

## **Addendum: A Look at Google Analytics Competitors**

Please note that in addition to all listed "cons" listed below, every one of the following GA competitors also has the following 2 additional "cons:" 1) Loss of historical data from current GA reporting across all departments and units; and 2) Very small market share, reducing access to training, collaboration, and documentation.

Competitor	Pros	Cons
Analog Analyzer <sup>8</sup>	<ul><li>Free</li><li>Requires no code modification</li><li>Very accurate</li></ul>	<ul> <li>Potentially unsafe; original developer hasn't updated it since Dec. 2004 and volunteers have not updated it much since 2009—likely to contain bugs</li> <li>Offers only basic Web traffic analysis and lacks many of the features of GA</li> </ul>
CoreMetrics (IBM Enterprise Marketing)	<ul> <li>Strong, 24x7 support</li> <li>Multiple data export options</li> </ul>	<ul> <li>Costly; exact pricing only offered by custom quote but increases based upon traffic</li> <li>Very complex, not friendly for beginners or the less tech-savvy who need access to Web metrics</li> </ul>
Open Web Analytics	• Free; software covered under General Public License (GPL)	<ul> <li>Unable to track mobile usage</li> <li>Requires large amount of labor for implementation and tracking organization to begin using software</li> <li>Data cannot be exported for reporting</li> </ul>
PiWik <sup>9</sup>	<ul> <li>Open-source solution in use at UVA in some departments</li> <li>Fairly robust/mature (somewhat like GA)</li> <li>Local hosting of data</li> <li>Good for very accurate tracking of downloads via server logs</li> </ul>	<ul> <li>Requires costs of self-hosted server setup and maintenance (including backups, security, restores, etc. and the costs associated), or if using PiWik cloud (and not self-hosting), pricing starts at \$130/month</li> <li>Much less user-friendly UI than GA, as GA is for the enterprise and therefore more user-friendly</li> <li>Lacking all the features of GA; although an import script is available to bring GA data in, it has not been kept updated, so unlikely to pull new features added since the debut of Google's Universal Analytics</li> </ul>
SiteCatalyst (Adobe Analytics)	<ul> <li>Very robust; closest competitor to GA in terms of functionality</li> <li>Strong, 24x7 support</li> </ul>	<ul> <li>Expensive; ~\$100,000/year; exact pricing only offered by custom quote but increases based on traffic</li> <li>Very complex, not friendly for beginners or the less tech-savvy who need access to Web metrics</li> <li>Criticized for masking its involvement in data mining and tracking</li> </ul>
Smarter Stats	<ul><li>Free/inexpensive</li><li>Local hosting of data</li></ul>	<ul> <li>Lacking many of the features of GA</li> <li>Requires server setup and maintenance costs</li> </ul>

 $<sup>^8</sup>$  Could not include a hyperlink for this, as company apparently no longer has a functioning website as of  $_{11/5/14}$ .

<sup>&</sup>lt;sup>9</sup> We talked with UVA Web developers who have experience using PiWik in order to provide an accurate assessment of it here. Some uWeb Steering Committee members also ran a 3-week trial to compare GA & PiWik.



May 21-22, 2014

IC Design Principles 66 Appendix H



## **Internal Communication: Agenda**

- What is Internal Communications?
- Why is it important to your department and the University?
- Why is it a challenge?
- How can we do it better?
- Personal commitment to making it better



What is it?
It's the
HOW and the
WHAT





## Who cares?

- Levels of employee engagement are higher at companies that communicate effectively
- Good communication, including LISTENING, is one of the largest drivers of productivity and retention
- Employees are more likely to support change if they hear it from their manager



## Working in a Multigenerational workplace

- Veterans: born between 1922-1943
- Baby Boomers: born between 1943-1960
- Gen "X" or Generation X: born between 1961-1980
- Millennials or Gen.Y: born after 1980

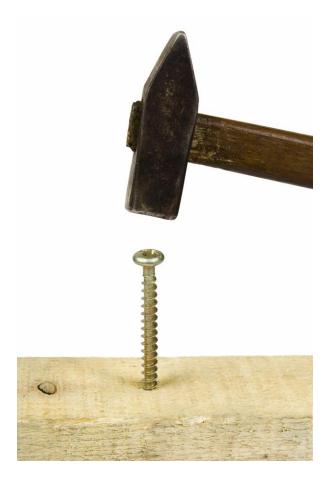


## Improving communication:

- SHARE! SHARE! & SHARE SOME MORE!
- Listen and respond
- Change to meet team needs



What's the appropriate tool to deliver the message?





- Measure and Assess
  - Did they receive the message?
  - Did they understand it?
  - ➤ How was it received?
  - ➤ Did they do what I you wanted them to do?
- Follow-up





# Take away sheet

Here's one thing that I will do to improve internal communications at work:				
By this date:				
Sianed				