UCSF Enterprise-wide Research and Education License for Qualtrics

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Project Leaders: Orlando Leon, Lead; Beth Berrean, Co-Lead

Project Sponsors: Elazar Harel, CIO, Joe Castro, UCSF Chancellor/EVC/FAS, Opinder Bawa, CTO

Qualtrics Advisory Group: School of Nursing: Teresa Scherzer, (Tina Baggott, DorAnne Donesky); School of Medicine/UME: Allison Chen, Arianne Teherani, Kevin Souza; School of Dentistry: Gwen Essex; School of Pharmacy: Tina Brock, Joe Crawford; Graduate Division: Rick Wyllie, Jonathan Johnson; Memory and Aging: Joe Hesse; Graduate Medical Education: Gitanjali Kapur; Center for Health Professions: Dennis Keane; Clinical & Translational Science Institute: Chris Garrett; Library: Gail Persily, Brian Warling; Student Academic Affairs: Sierra Alvis; Program Management Office: Erika Luger; DOM: Erik Wieland; Academic Senate: Artemio Cardena

Project Description:

Our project to negotiate and deploy an enterprise version of Qualtrics, software as a service survey tool used extensively by the Center for Health Professionals within the School of Nursing, was prompted by a request from Opinder Bawa on behalf of the UCSF IT Governance Committee for Educational Technology (CET). A small team formed in the Fall of 2011 to investigate the appropriateness of a UCSF wide license. The team lead by Orlando Leon, Director Student Information Systems and assisted by Beth Berrean worked to identify existing survey tools and known requirements and to evaluate Qualtrics (and other solutions).

The team worked closely with heavy survey users such as the Evaluations group within the School of Medicine’s Undergraduate Medical Education. This group used a different server based survey tool while researchers across the organization relied heavily on RedCap, an open-source survey tool. Representatives from the various stakeholder groups were allowed access to test accounts and Orlando and Beth translated business requirements such as the need to send anonymous surveys with technical needs—integration with our single sign on solution, APIs to other campus tools such as Salesforce and usability and operational needs—into the ability to check for accessible surveys, the ability to delegate administration of divisions, support multiple sub-brands and online training and support.

Qualtrics met and exceeded most requirements and at the December 2011 governance committee meeting, the CET supported the recommendation to proceed with site licensing for Qualtrics. Elazar Harel, CIO and Joe Castro, EVC agreed to jointly fund the license, with a commitment of support for at least three years. Orlando and Beth worked with Campus Strategic Sourcing to negotiate a Business Associates Agreement and the purchasing contract. Having an IT governance process in place was critical to
the ability to quickly gain business consensus across the educational, research and administrative functions.

As soon as the contract was approved, Orlando formed the Qualtrics Advisory and Oversight Committee with representatives from the major campus organizations planning to use the survey tool. Their involvement and collaboration in configuring the tool and license options proved critical to the successful adoption of the tool. Not only did the members use and advocate for the tool, they made recommendations on how divisions should be formed, what sort of skins and support should be offered and even helped organize on-site trainings and discussions. From the beginning of its introduction to the campus, Qualtrics has been almost entirely user-led with IT staff from multiple organizations simply providing expertise and a structure for its adoption.

In the early spring, the Advisory Committee published guidance about the tool on the ITS website and use began in earnest. The tool was officially introduced to the campus in early June in the IT@UCSF News email from Elazar Harel.

Documentation and discussion on the use of Qualtrics continues to grow with additional pages being added to the website including a comparison of survey tools at UCSF, a wiki presence for the committee and division administrators, a common email, a list serv and an active Chatter group for users of the system.

Also critical to the success of the initial roll out was a marketing campaign led by Sierra Alvis Robinson that included posters and ads. Qualtrics at UCSF also organized a day training October 17, 2012, with in-person Qualtrics representatives, to give users a chance to ask questions directly of the company. Finally, the Qualtrics group also demoed the system at UCSF’s first ShareCase event.

The result of the marketing has been widespread adoption with 1158 surveys created since inception, 1189 users in 27 different divisions or groups. Qualtrics has also enabled end user innovation in such ways as:

- Branded Customer Service feedback forms
- Integration of surveys and checklists into Onboarding processes
- Elimination of File Maker Pro web forms in at least two instances
- Integration within a web application using custom REST API call to create a logical survey form to determine a student’s statement of legal residence
- Ability to collaborate outside of a “brand” so no need to share account details with collaborators

Finally, UCSF continues to benefit from ongoing enhancements to the product and has even managed to work with the company to see some frequently requested features including:

- Engaging the UCSF Salesforce team and Qualtrics to enhance Salesforce integration
- Web Accessibility Checking tool (Section 508) built in to Qualtrics, along with multi-language translation support
- Mobile compatibility checking tool, just released
Specifically, UCSF is often able to quickly implement new features (http://www.qualtrics.com/research-suite/new-features/) and can engage select parties in detailed conversations about those features such as an upcoming May 29th webinar about the offline survey capability.

**Timeline:**

- August 2011 – Request to evaluate UCSF wide license for Qualtrics
- September 2011 - Beth Berrean and Orlando Leon tasked with evaluation
- December 2011 - Recommendation for enterprise license approved
- February 2012 – Contract Signed, BAA negotiated, SSO integration and launch
- February-May 2012 – Pilot usage and development of guidelines and skins
- June 2012 – Official announcement and marketing campaign
- October 2012 – Qualtrics Day at UCSF

**Supporting URLs**

Initial Recommendations: 

Comparisons:

Final Recommendation including projected costs:
http://itgov.ucsf.edu/sites/itgov.ucsf.edu/files/uploads/survey_tool_recommendation.pptx

IT Service Catalog:
http://it.ucsf.edu/services/qualtrics-web-surveys

Wiki documentation:
https://wiki.library.ucsf.edu/display/Qualtrics/Qualtrics+at+UCSF

**Customer Comments:**

Here are some of the ways are users have reported the value of Qualtrics:

“My department whole-heartedly embraced Qualtrics in replace of the myriad online survey tools it was previously using. The result has been the creation and utilization of more sophisticated, more robust and more secure online surveys and forms, all without the cost of yearly membership fees we had been paying for similar tools. In addition:

- The templates and libraries ensure our surveys are consistent in look and feel and comply with University Relations identity guidelines.
- The advanced reporting features allow us to chart, compare and share data in ways that accelerate the work we do.
- Qualtrics’ online support and tutorials, coupled with UCSF’s online and in-person trainings and resources, have allowed even our most beginning users to utilize the tools with ease.
- By including Qualtrics in the "MyAccess" suite of tools, we are able to easily access
our surveys from any location and without having to remember unique login and passwords. “

Sierra Alvis Robinson  
Communications Manager, Student Academic Affairs  
University of California, San Francisco

“SOM Office of Medical Education: During our latest accreditation review, we were required by the LCME to come up with a method of ensuring that the course & program objectives are being read by all instructors of medical students, including documentation that the objectives were read. We developed a system in which we obtain faculty rosters, then construct custom URLs for each faculty member that link to an attestation form on Qualtrics. Our app sends email to the faculty that includes the text of the course objectives from the Ilios application, and provides the custom URL in the email text. The URL includes the faculty name, course name, and a unique ID that links back to our database. We export the Qualtrics responses and import them into our application, and can easily report on the attestation rates. The key feature of this scheme is the custom URL and the ability to embed the unique id, which is invisible to the faculty when they are filing out the form.”

Bonnie Hellevig  
Director for Educational Data  
Office of Medical Education, UCSF School of Medicine  
Bonnie.Hellevig@ucsf.edu

“I have used Qualtrics for a variety of projects, such as collecting student info and pictures for profiles on our website, facilitating the student government elections, designing applications for conferences, and of course collecting basic survey results. I really appreciate the form logic and auto responses built into Qualtrics as well as the ability for users to upload info into the survey instead of having to ask them to email you an attachment after completing the survey.”

Jennifer Rosko  
Student Activity Center  
Office of Student Life  
email: jennifer.rosko@ucsf.edu

“CTSI’s Virtual Home team has used Qualtrics for a variety of surveys and we’ve moved away from Survey Monkey now that this is available. Mostly we have gathered feedback from users of our software applications – from administrators to staff to researchers. It’s easy to use for both our team and the respondents, and the reporting is great.”

Leslie Yuan  
Director, Virtual Home  
Leslie.yuan@ucsf.edu
Self-Enrollment Access Code: tzmGT

Distribute this access code to allow new users to self-enroll in your organization.

Auditable Responses

160981 Auditable Responses since October 1, 2011

Surveys

1158 New Surveys since October 1, 2011

Users

1189 Users in 27 groups

Most Active Surveys

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Export Stats to CSV