

**Faculty Senate Executive Committee**  
Monday, September 8, 2014  
3:00a.m. – 5:00p.m. – Adelbert Hall, Room M2

AGENDA

- |           |  |                                    |
|-----------|--|------------------------------------|
| 3:00 p.m. | Approval of Minutes from the April 10, 2014 Executive Committee meeting, <i>attachment</i> | R. Savinell                        |
| 3:05 p.m. | President and Provost Announcements  | B. Snyder<br>W. Baeslack           |
| 3:10 p.m. | Chair's Announcements  | R. Savinell                        |
| 3:15 p.m. | Revisions to Faculty Handbook: State of the University Address, <i>attachment</i>          | D. Carney                          |
| 3:25 p.m. | Minor in Social Justice, <i>attachment</i>   | J. Ruhl<br>R. Williams<br>S. Hinze |
| 3:30 p.m. | Minor in Data Science, <i>attachment</i>   | J. Ruhl<br>A. Abramson             |
| 3:35 p.m. | Revisions to Research Misconduct Policy, <i>attachment</i>                                 | L. Hoffer<br>S. Rivera             |
| 3:45 p.m. | Update from ad Hoc Committee on Course Evaluation Implementation                           | R. Dubin                           |
| 4:00 p.m. | Approval of Faculty Senate Representative to the Faculty Conflict of Interest Committee    | R. Savinell                        |
| 4:05 p.m. | Draft Tobacco Free Campus Policy, <i>attachment</i>  | E. Click                           |
| 4:20 p.m. | Faculty Senate Position on Ohio House Bill 597, <i>attachment</i>                          | P. Princehouse                     |
| 4:30 p.m. | Proposed Health Benefits for Gender Affirmation Services, <i>attachment</i>                | C. Gregory                         |

4:45 p.m.	Revisions to Committee on Graduate Studies Charge, <i>attachment</i>	D. Carney
4:55 p.m.	Approval of Faculty Senate Agenda, <i>attachment</i>	B. Savinell

**Faculty Senate Executive Committee  
Minutes of the September 8, 2014 Meeting  
Adelbert Hall, Room M2**

**Committee Members in Attendance**

Alexis Abramson, CSE  
Juscelino Colares, LAW  
Robin Dubin, Past Chair  
Peter Harte, SOM  
Zina Kaleinikova, SODM  
Carol Musil, SON  
Roy Ritzmann, CAS, Vice Chair  
Sandy Russ, CAS, Past Chair  
Robert Savinell, CSE, Chair  
Barbara Snyder, President  
Gillian Weiss, CAS

**Committee Members Absent**

Bud Baeslack, Provost  
Susan Case, WSOM  
Sonia Minnes, MSASS

**Others Present**

David Carney, Chair, By-Laws Committee  
Nicole Deming, Chair, Faculty Personnel Committee  
Lee Hoffer, Chair, Research Committee  
David Hussey, MSASS (substitute for Sonia Minnes)  
Kurt Koenigsberger, Chair, University Libraries Committee

**Guests:**

Rhonda Williams  
Susan Hinze  
Robin Dubin  
Elizabeth Click  
Sue Rivera  
Patricia Princehouse

**Call to Order**

Professor Robert Savinell, chair, Faculty Senate, called the meeting to order at 3:00 p.m.

**Approval of Minutes**

The minutes of the April 10, 2014 meeting of the Faculty Senate Executive Committee were reviewed and approved. *Attachment*

### **President's Announcements**

The President welcomed the Executive Committee members. The Tinkham Veale Student Center was dedicated on August 24<sup>th</sup>. At the dedication ceremony, the President announced an expansion of the university's \$1 billion capital campaign. The \$1 billion goal was reached at the end of June and the campaign committee and CWRU Board of Trustees approved a new goal of \$1.5 billion. Many development records having been broken this year. Pledges for sixty new endowed faculty positions have been received. These positions are not filled until the pledged funds have been received. The development office is seeking funding for endowed dean positions. A pledge in the amount of \$3 million has been received for the dean of MSASS.

The President spoke about the memorial service that took place on September 5<sup>th</sup> for the four CWRU students who were killed in a private airplane crash. This was a tragic beginning to the academic year.

### **Chairs Announcements**

Prof. Savinell welcomed Professor Roy Ritzmann, CAS, vice chair of the Faculty Senate. Prof. Ritzmann will be meeting with departments within the college/schools to learn about faculty concerns and issues.

### **Revisions to Faculty Handbook: State of the University Report**

Professor David Carney, chair of the Senate By-Laws Committee, presented proposed revisions to Chapter 2, Article IV, Sec. A of the Faculty Handbook. The proposed revisions give the President the option to provide a written state of the university report rather than having to provide an oral state of the university report at the annual meeting of the University Faculty. The reports have been poorly attended in the past. If the President chooses to provide a written report, the proposed revisions state that he/she must make another in-person opportunity available for faculty. The Executive Committee voted to include the revisions on the agenda for the Faculty Senate meeting. *Attachment*

### **Minor in Social Justice**

Professor Rhonda Williams presented the proposed minor in Social Justice. The minor has been developed over the past four years and was an outgrowth of the alliance on social justice that resulted from the 2008 strategic plan. The minor has been approved by all requisite bodies. Even though it will be housed in the CAS it is a university-wide program. A committee member asked whether the SOM had been involved in the development of the minor. Prof. Williams said that Professor Scott Frank from SOM had been on the team, but no one from the SODM had been involved. The Executive Committee voted to include the minor on the agenda for the Faculty Senate meeting. *Attachment*

### **Minor in Data Science**

Professor Alexis Abramson, CSE representative on the Executive Committee, presented the minor in Data Science in place of Professor Roger French who was unable to attend the meeting. The minor will be housed in the CSE but will have faculty representation from five different schools. Courses in the minor will build upon each other. Prof. Abramson said that the CSE undergraduate committee had not yet approved the minor. The Executive Committee voted to approve placing the minor on the agenda for the Faculty Senate meeting, contingent upon approval by the CSE undergraduate committee. By

the end of the meeting, Prof. Abramson confirmed that the CSE undergraduate committee had in fact approved the minor. *Attachment*

### **Revisions to Research Misconduct Policy**

Professor Lee Hoffer, chair of the Faculty Senate Committee on Research, introduced Sue Rivera, Associate Vice President for Research, who presented revisions to the research misconduct provisions of the Faculty Handbook. The revisions had been recommended by the Federal Office of Research Integrity (ORI) and approved by the Faculty Senate Research Committee. Ms. Rivera discussed the proposed revisions to the policy which include a link to the appropriate contact officer at the university, and a reduction in the number of days a respondent has to comment on the inquiry and draft investigation reports. The reduction in the number of days is required so that the university has a sufficient amount of time to meet its reporting requirements to the ORI. A respondent may always request an extension if needed.

Ms. Rivera also suggested that the language in Sec. I (1) of the policy that refers to “any appeals” be removed since the policy does not include an appeal process at the university level. Appeals can be made to the ORI. A committee member objected to the removal of any language that would deny faculty rights. The committee decided that since the current policy does not include a right to appeal, the language should be removed in order to avoid confusion. The question of whether to include an appeals process can be brought to the Senate at a later time.

A committee member said that the language of the policy in Sect. H (6) (ii) relating to the required contents of the investigation report was unclear. This language should be reviewed and revised by the Senate By-Laws Committee.

Ms. Rivera suggested that the Senate adopt similar language to that contained within the university’s Conflict of Interest policy which provides that when revisions or additions to the policy are required by law or by government agency action, that they will become part of the policy. This language implies that Senate approval would not be required.

The Executive Committee approved forwarding the proposed revisions to the Faculty Senate By-Laws Committee for review. *Attachment*

### **Update from ad hoc Committee on Course Evaluation Implementation**

Professor Robin Dubin reviewed the recommendations from the ad hoc Committee on Course Evaluations. The ad hoc Committee had been charged with making recommendations for implementation, in the fall of 2014, of the new undergraduate course evaluations approved by the Faculty Senate during the 2013-14 academic year. The Committee recommended that the university:

1. Pilot the EvaluationKIT this fall
2. Keep evaluations open until the end of *final exams*
3. Permit faculty (and others, as appropriate) to add questions from a question library

4. Add textual analysis in the future
5. Address validity issues in the future

The recommendation to keep the course evaluations open until the end of the final exam period was a departure from FSCUE's recommendation that student grades not be released until the student completed the course evaluation or until all grades were due, whichever was sooner. The ad hoc Committee had determined that it would not be feasible to implement this at the present time. Several faculty expressed the concern that students would be able to find out their grades prior to completion of the course evaluation and that this would impact their rating of the instructor. This is an issue for faculty since course evaluations are used in promotion and tenure decisions.

A motion was made and seconded for Prof. Dubin to update the Faculty Senate on the committee's work and to discuss those recommendations that differ from what the Senate had previously approved. The motion was approved by the Executive Committee. *Attachment*

#### **Approval of Faculty Senate Representative to the Faculty Conflict of Interest Policy**

The Executive Committee was asked to approve the appointment of Professor Andrew Collins as the Faculty Senate representative to the Faculty Conflict of Interest Committee. Approval by the Executive Committee is required under the Faculty Handbook. A motion was made and seconded to approve his appointment. The appointment term is not limited.

#### **Draft Tobacco Free Campus Policy**

Professor Elizabeth Click, CWRU Medical Director, is seeking endorsement from the Faculty Senate to explore the concept of a tobacco free campus. Prof. Click is seeking endorsement from several groups on campus and the SAC has just recently given their endorsement. If the concept is endorsed, then a task force will be convened to draft a policy. Several issues were raised by committee members including rules for visitors on campus and how the policy would be enforced. Prof. Click said that the university is genuinely concerned about the health of the campus community and does not promote confrontation among community members. Prof. Savinell suggested that since the Faculty Senate had not yet heard a presentation on the topic, that Prof. Click should report to the Senate at its September meeting. The Executive Committee voted to approve placing this item on the Faculty Senate agenda. *Attachment*

#### **Faculty Senate Position on Ohio House Bill 597**

Professor Patricia Princehouse discussed Ohio House Bill 597 which repeals the common core science standards and replaces them with education that would allow intelligent design and creationism to be taught alongside evolution in science classes. Prof. Princehouse would like to see a statement from the CWRU faculty opposing the bill. Prof. Savinell suggested that Prof. Princehouse draft a statement or resolution for the Faculty Senate to consider. The members of the Executive Committee voted to place this item on the agenda for the Faculty Senate meeting, however, there was no longer a sufficient number of members in attendance to constitute a quorum. The committee suggested that Prof. Princehouse follow the procedures in the Faculty Senate By-Laws for introducing new business at a Senate meeting without approval of the Executive Committee. *Attachment*

#### **Proposed Health Benefits for Gender Affirmation Services**

This item was postponed due to insufficient time.

**Revisions to Committee on Graduate Studies Charge**

This item was postponed due to insufficient time.

**Approval of Faculty Senate Agenda**

The agenda for the Faculty Senate meeting was approved with the deletion of the above two items.

The meeting was adjourned at 5:10pm

Approved by the Faculty Senate Executive Committee

A handwritten signature in cursive script that reads "Rebecca Weiss".

Rebecca Weiss  
Secretary of the University Faculty

Sec. A. Annual Meeting and Report on State of the University

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~~Early in the fall term, the University Faculty shall have an annual meeting and the president shall report to the University Faculty on the state of the university, and the University Faculty shall have an annual meeting.~~ The president's report may be made in writing prior to the ~~a~~Annual mMeeting or delivered orally at the ~~a~~Annual mMeeting. ~~The University Faculty shall have an annual meeting early in the fall term.~~ Staff may be invited by the president and the chair of the Faculty Senate to attend ~~anya~~ report delivered orally ~~on the state of the university~~ and discussion thereon. The report shall be delivered immediately after the meeting is called to order. ~~The agenda for the annual meeting shall~~ ~~shall include a written or oral report by the president on the state of the University and~~ such additional business as may be introduced by the process of initiative as provided in Article VIII. ~~Staff may be invited by the president and the chair of the Senate to attend the~~any report on the state of the University and discussion thereon. ~~Such a~~That report shall then be delivered immediately after the meeting is called to order and all other business that concerns just the University Faculty, if any, shall follow discussion of the report. ~~If the president chooses to provide a written report, chooses not to deliver an oral report on the state of the University at the annual meeting, the president/she shall annually provide some other in-person opportunity for the University Faculty to communicate with the president regarding the state of the University and its academic units.~~

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College/School: College of Arts and Sciences

Department: This is a University-wide initiative with no home department. We are requesting the program be housed for now in the College of Arts and Sciences.

PROPOSED: \_\_\_\_\_ major  
 minor  
\_\_\_\_\_ program  
\_\_\_\_\_ sequence  
\_\_\_\_\_ degree

**APPROVED**

A&S Executive Committee  
10-10-13

A&S Faculty 3-28-14

Dean of the College 4-1-14

TITLE: Social Justice Minor

EFFECTIVE: ~~Fall~~ (semester)

2014?  
~~2013~~ (year)

DESCRIPTION:

See Attached Social Justice Minor Rubric

Is this minor: \_\_\_\_\_  new  
\_\_\_\_\_ modification  
\_\_\_\_\_ replacement

If modification or replacement please elaborate: NA

Does this change in minor involve other departments? \_\_\_\_\_  Yes \_\_\_\_\_ No

If yes, which departments? As specified in the rubric, approved courses for the Minor are housed in eight departments and two programs in the College: History, Ethnic Studies, Philosophy, Women's and Gender Studies, Modern Languages and Literatures, English, Religious Studies, Sociology, and Political Science. In addition, two approved courses are located each in the School of Management's Organizational Behavior Department, as well as the Master's of Public Health Program in Medicine.

Proposal resubmitted 9-23-13

SIGNATURES:

Program Director for Social Justice Institute: \_\_\_\_\_

*Rhonda Williams*

DATE  
12/6/2012

Department Chairs: (SEE ATTACHED SIGNATURE PAGES)

Program Curriculum Committee Chair: \_\_\_\_\_

*Jusan W. King*

12/6/12

College/School Dean(s): \_\_\_\_\_

*[Signature]*

4/1/14

UUF Curriculum Committee Chair: \_\_\_\_\_

File copy sent to:

Registrar  
 Other:

Office of Undergraduate Studies/Graduate Studies

FSCUE, R. Williams & S. Anze - Social Justice Program

Department Chair, English

Maya

12/4/12

Program Chair, Ethnic Studies

Ch/2

12-6-12

Department Chair, Modern Languages and Literatures

Antonio Candia

12/4/

Department Chair, Philosophy

James E. Hengstler

12-4-12

Department Chair, Political Science

Joseph White

12/5/12

I approve inclusion of POSC 322/422 and  
POSC 346/446 in The Social Justice Minor

Department Chair, Public Health

Erin Jones

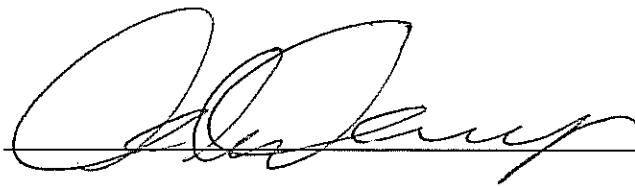
12/5/12

Department Chair, Religion

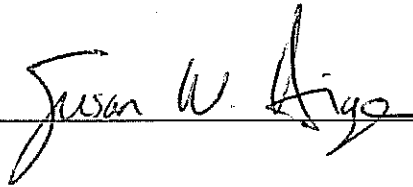
Peter Hades

12/05/2012

Department Chair, Sociology

 12/4/12

Program Chair, Women's and Gender Studies

 12/4/12

Dec 5 (1 day ago)

Jonathan Sadowsky

to Marissa, me

I'm home with sick child. But I am prepared to sign. You could fish out of my mailbox and get signature from Marissa Ross, whom I empower to sign for me with this e-mail. JS

Department Chair, History





Ronald E. Fry, Chair of the Department of Organizational Behavior

----- Forwarded message -----

From: Ronald Fry <rf15@case.edu>

Date: Tue, Dec 4, 2012 at 5:14 PM

Subject: Re: TIMELY: Social Justice Institute Minor Program: Approval Needed

To: Lila Robinson <lila.robinson@case.edu>

Cc: Rhonda Williams <ryw@case.edu>, "Susan,W Hinze" <susan.hinze@case.edu>

Rhonda and Susan,

I am away with our MPOD students on a study tour in Europe and not returning until the 14th.

I approve the inclusion of Professor Susan Case's course in the new curriculum for the Social Justice minor.

either of you can sign for me if a signature is required.

Thank you,

Ron fry



**Social Justice Institute**

Case Western Reserve University  
10900 Euclid Avenue  
Clark Hall 101  
Cleveland, Ohio 44106-7243  
216 368-7568 - office  
216 368-8763 - fax

September 23, 2013

**Re: Resubmission of Social Justice Minor Program for Approval**

This memo serves as notice of resubmission, for approval by the College of Arts & Sciences, of the Social Justice Minor Program. The Institute desires its Minor Program to be operational in Spring 2014. Original documents from our December 2012 submission are attached as Appendix A (Proposed New Minor for CAS) and Appendix B (Justification for Minor in Social Justice).

After assessing reviews and comments from the curriculum, budget, and executive committees, and engaging in follow-up conversations and meetings with the CAS Executive Committee, CAS Dean Cyrus Taylor, and Provost Bud Baeslack, the Social Justice Institute's Curriculum Development Team has confidence that it has addressed the questions and concerns raised. Please find a synopsis below.

Thank you for your time, attention, and support of the Social Justice Minor Program.

**1. Outstanding Approval of Curriculum's Core Courses**

- SJI's Curriculum Development Team has drafted and submitted for approval syllabi for its two core courses that had not initially been submitted. Both courses have been submitted to CEP for approval.
  - The first, SJUS 200, is its one-credit course offering a real-world seminar experience. The course encourages students to attend out-of-classroom events on campus and in the community that relate to social justice, with a particular focus on topics and themes that meet the learning objective of the Minor. Social Justice Minors are expected to attend 8 lectures, workshops, and other events approved by their advisor. (See Appendix C.)



- The second, SJUS 300, is the capstone course. Students are required to complete a capstone experience, applying the knowledge in their major field of study or within the social justice minor. The capstone experience is to be developed and administered by the major adviser and the social justice faculty adviser. The SJ capstone experience should conform to the requirements for the SAGES capstone. Given the latter requirement, the Curriculum Team co-chairs submitted the latter course to Peter Whiting for review. Peter Whiting has given his support. (See Appendix D.)

## 2. Sustainability & Financial Concerns

As outlined in the original Proposed New Minor document, there are not significant additional financial costs. However, please, see below the Institute's specific responses to the concerns raised.

- *SJUS 100 Introductory Course Rotation:* In a summer meeting with Dean Taylor and Provost Baeslack, the Institute was asked to submit a 3-year rotation of faculty members who would co-teach the SJUS 100 course so that the Dean and Provost could seek pre-approval for the participation of identified faculty members from the appropriate chairs and deans. The Institute did this, and Dean Taylor has proceeded to secure the requisite approval. The CAS Dean also has agreed to proactively negotiate the terms of participation, on a case-by-case basis for faculty, with support of the Provost. As the initial three-year rotation ends, the Institute will once again – as an established practice – establish its new three-year rotation and with the appropriate administrators once again seek approval from the requisite chairs and deans. This will ensure ongoing coverage of the introductory core course for the Minor Program.
- *Course Rostering & Financial Cost:* The Institute's administrator as the staff person, with help from the Institute Director and the co-chairs of the Curriculum Team (all faculty members), will make sure that the core courses are rostered. This does not require additional support, beyond the payment of staff salary already given.

The aforementioned faculty members – as members of the Leadership Team and Curriculum Team – also will continue to review and assess courses already approved for the Minor Program, as well as potential new courses that could be approved for the Minor Program.

The Director is now considering plans to identify an SJI “academic director” in FY’15 who would oversee this particular function as part of her/his responsibilities, as well as the Institute's ongoing curriculum development initiatives and pedagogical innovation.



The “academic director” will be paid a nominal stipend (about \$4-5,000 annually) either in the form of additional salary or research & travel funds. The Institute can support this for at least the next 2-3 years as we pilot the Minor Program – without additional development dollars, which is anticipated in the future.

- Range of Courses Available to Support the Minor:
  - As specified in the original proposal, the Institute already has identified and approved a critical mass of existing courses that will fulfill the Minor Program. These will be listed on the SJI website so students have a central location to consult for available courses.
  - The Institute also will launch in September a series of “calls for proposals.” The proposals will be due in December 2013, and the announcements of awards will be made in February 2014. One of these CFPs offers “Social Justice Course Re-design” opportunities. The CFP is explicitly for faculty who wish to re-design a course currently in the undergraduate curriculum to include a significant focus on social justice. These courses will maintain a home department designation, and may be cross-listed with a SJUS designation.

Sincerely,

Rhonda Williams, Director of the Social Justice Institute

Susan W. Hinze and Diana Morris, Co-Chairs of the SJI Curriculum Committee

Guidelines for College Consideration of  
Proposed New Minor College of Arts and Sciences  
November 30, 2012

Attached please find our proposed **Social Justice Minor Program**, complete with a justification for the development of a university-wide curriculum and signature identity for CWRU in Social Justice Studies. Our document has evolved over a two-year planning process, and is a coherent entity highlighting the process of curricular collaboration and innovation, evidence of student appeal, the mission and objectives of the planned curriculum, and details of the requirements for a Minor in Social Justice Studies.

We appreciate the questions posed by the CAS Budget Subcommittee and the CSPSC, and do our best to answer the questions in the order they are proposed in this form---CAS guidelines for college consideration of a new degree program. Please note that there is some overlap between our attached document, and the answers to the questions, below. In sum, we view the potential benefits of our proposal as outweighing potential risks, and hope we have incorporated ample information about financial issues, the attractiveness of our program to students, the potential effect on research and creative activity and reputation, and congruence with the college's strategic plan.

**1. How is the proposed program important to the sponsoring department/interdisciplinary program? Discuss the relationship between the proposed new program and current programs (graduate and/or undergraduate), including its impact with respect to allocation of resources.**

The proposed program is a stand alone interdisciplinary university-wide program, with no sponsoring department. The program has been developed as part of the CWRU Social Justice Institute, created from the Provost's interdisciplinary Alliance Investment Grants and in line with the University's strategic, interdisciplinary priorities. As a university wide institute, the Social Justice Institute has a mission to advance education, research and community that inspires creative, sustainable, and just solutions to social problems.

The curriculum presented here achieves the first and second goals of the Social Justice Institute: 1.) supporting innovative and synergistic research, scholarship and pedagogy; and 2.) building and supporting social justice leaders.

The relationship between the proposed minor in Social Justice and current programs is synergistic. Our minor has two required SJUS courses: Introduction to Social Justice, and the Social Justice capstone. Hence, some faculty teaching time may need to be reallocated to the required courses from other departments. Since the SJI has already hired two faculty in Social Justice, with plans for 2-3 more, we anticipate some course coverage through the SJI hires. The other four electives are chosen from a list of thoroughly vetted courses that are housed in other departments and approved by faculty and department Chairs as electives for SJUS. We view the program design as a win-win: our SJUS students benefit from the expertise of faculty across the college and university, and the social justice program will draw students into courses housed in other departments thus boosting enrollments for home departments.

If a SJUS required course is taught by a faculty member outside the college, there is potential for a

portion of the tuition to be directed to that faculty's home department depending on the university's formula. The actual amount of monies reallocated would be minimal even in this scenario.

## **2. What is the perceived need or market for the program?**

We share a sentiment expressed from the Office of the Provost and other forums at the University that Social Justice, as a topic and as a Minor, holds great appeal for students from different schools. Members of the curriculum committee have each related interest from students within their schools. For instance, in the School of Nursing, a significant lure for potential undergraduate students and parents is the 10-week community-based immersion experience that focuses on health policy and inequality, culture and ethics. The opportunity to incorporate nursing study in the social justice minor has the potential to be attractive to the same students. In Electrical Engineering and Computer Science within the School of Engineering, a significant cohort of students were excited and intrigued by the possibility of a Social Justice minor. During a College of Arts & Sciences Open House, students and their parents explicitly expressed enthusiasm and interest in a Social Justice program of study.

In addition to this, focus group and survey research was conducted by students in School of Management Professor Susan Case's Managing Diversity and Inclusion class. The research was designed to assess the general CWRU student body interest in social justice as an undergraduate minor and graduate certificate program. Undergraduate students were drawn from the College of Arts and Sciences, Engineering, Nursing, and Weatherhead. With regard to the Social Justice undergraduate minor, strongest interest came from students in the humanities, social sciences, nursing, and WSOM. Many of these students wanted the program to include a field experience as well as international scope. They could see how such an emphasis would be helpful to them in their current areas of study.

Finally, the signature "Introduction to Social Justice" course was taught for the first time during Spring of 2012. Co-taught by Director of the SJI, Dr. Rhonda Williams, and Cellar Professor of Nursing, Dr. Diana Morris, the course achieved full enrollment with N = 18 students and further demonstrates the appeal of the program. Students in the class were from first through fourth years, and from a range of academic backgrounds and majors. Several students were already engaged in an area of social justice, and were eager to learn more about developing problem-solving skills and strategies to their areas of interest; such needs would be addressed through completion of the Social Justice Minor. In addition, most students from the SJUS 100 course expressed an interest in pursuing additional social justice coursework.

Assessing all of this information, the planning team believes that there is substantial existing interest in a Social Justice Minor that would enhance student exposure to social justice issues in the United States and throughout the world and that would develop their skills to become leaders and advocates of change. The team also believes that there is profound potential for teaching students, not fully convinced of its pertinence, about how social justice can enhance their personal, intellectual, and professional lives – no matter what their areas of study.

The interdisciplinary team of faculty on the SJI Curriculum Committee was enthusiastic about program development and found the process intellectually valuable demonstrating faculty interest and potential for future collaborative projects across departments and units.

Beyond the interest of those faculty planning the curriculum is the interest of faculty who were invited to include their course in the review process for the minor.



**3. What are the projected costs necessary to mount the program? More specifically, what are the projected needed near- and long-term resources and estimated costs for: faculty, staff, graduate student support, space, university resources (e.g., library needs).**

Near term resources have been provided by seed funding from the Provost's Interdisciplinary Alliance Investment Grant (IAIG). Funds from the grant have underwritten the curricular development of the minor, as well as resources for faculty to retool courses in line with the SJ Minor objectives, or create entirely new courses. This initiative is still in process.

The Social Justice Institute has a library budget (KSL) in keeping with their support of the SJI.

In addition, the College has already agreed to support the SJI and its effort to provide an innovative curriculum and new research partnerships. The two new SJI hires (with three additional hires expected) are evidence of this significant contribution. New faculty are contributing to the curriculum by teaching existing courses (e.g., John Flores is co-teaching SJUS 100 in Spring 2013; Tim Black will co-teach in Spring 2014), developing new courses, supervising capstones, and advising students. While the faculty were SJI hires, their respective departments (History and Sociology thus far) have reaped the benefits of having new faculty to support departmental programs. Other faculty across the university have expressed interest in teaching SJUS (e.g., Diana Morris from Nursing co-taught Spring 2012 and is scheduled for Spring 2013), developing new courses, and supervising capstones.

With the exception of the signature course and the capstone experience, the minor thus far draws upon existing courses. As outlined in the attached narrative and noted above, the SJI Curriculum Committee has already engaged in a lengthy process to identify appropriate courses. Existing funds will cover curricular innovation, including the voluntary retooling of existing courses and the creation of brand new courses with an explicit social justice framework that meets the established mission and objectives of the Minor Program.

The cost of the program over the longer term will be partially absorbed by the Social Justice Institute in the form of SJI faculty who are expected to teach approved social justice courses, and SJI staff who can help coordinate Minor matters. Since the College of Arts and Sciences is the lead school in this University-wide initiative, we expect continued support from administration, staff, and faculty for our innovative curricular development. In sum, costs to the college, beyond what has already been promised, are fairly limited for mounting and maintaining the Minor Program. In the future, we do hope to expand the Minor to a Major, as well as offer graduate and professional curricular opportunities. The director is in regular contact with the Dean of the College, as well as central development, as SJI works on a development strategy, plan, and "wish list" (such as undergraduate social justice scholarships) that, if secured, will support the expansion of curricular opportunities in the future.

**4. What is the projected income associated with the new program? Identify likely sources and assess the near- and long-term likelihood of raising funds to support the program in such categories as external and internal grants, philanthropy and other non-grant external funding, and tuition.**

A Social Justice Minor puts us ahead of the curve relative to our peer institutions (see #5, below) and

could attract potential students. Integrating our social justice mission through the Minor may enhance the overall attractiveness of the Social Justice Institute to potential donors.

## **5. What are the national and international competitive programs and their resources?**

A survey of our peer institutions (Brandeis, Carnegie Mellon, Emory, NYU, University of Chicago, University of Rochester and Washington University) reveals social justice programmatic initiatives but only one curriculum program. Brandeis offers a 15 hour (plus 1 internship) Minor in Social Justice and Social Policy. The others offer a range of programs, including The Center for Social Concern at Johns Hopkins and the Social Justice Center at Washington University.

Implementing a Minor Program at CWRU sets us apart from our peers in a distinctive manner; integrating our Social Justice commitment into the curriculum makes it foundational and provides opportunity for students to “get” social justice at a deeper, broader level than they would if they were simply involved in an occasional social justice program.

In **Appendix A**, we provide detail about program and curricular offerings in social justice in select peer institutions. We also provide information on innovative social justice programs springing up on the national scene. For example, Miami of Ohio, Northeastern Illinois University, ASU and James Madison offer some form of a Minor and/or Major in Justice Studies. Many of these programs and initiatives are housed in specific departmental- or school-based units. For instance, while ASU has a School of Social Transformation that serves as an umbrella and home for an MS in Justice Studies and MA in Social and Cultural Pedagogy, as well as doctoral degrees in Gender Studies and Justice Studies, it is housed in the College of Liberal Arts and Sciences. Miami University’s program is based out of the Sociology Department. The University of Illinois at Chicago recently founded a Social Justice Initiative, complete with plans for faculty cluster hires. Finally, a grant of \$23 million from the Arcus Foundation is funding the Center for Social Justice Leadership at Kalamazoo College. The program is an aspirational model for us, with four full-time staff members, endowed faculty chairs, fellowships for undergraduates and faculty, as well as comprehensive social justice programming for the college community.

## **6. How does the proposed program: a.) move the college’s strategic plan forward in regard to the goals for undergraduate and/or graduate education; b.) strengthen the discipline through scholarship; c.) foster collaboration across disciplines?; d.) increase attractiveness of the department and college?**

The CAS strategic plan highlights our mission of creating skilled and informed citizens who can serve local and national communities through collaboration and service. The Social Justice minor is designed to educate students about the meanings of social justice and how to promote it as informed citizens through their chosen career and life paths. The structure of our program promotes the growth and development of social change leaders. And the content of our Minor fosters collaboration across disciplines. Finally, the social justice minor enhances the attractiveness of the College and University by promoting a program dedicated to creating a democratic society that is diverse, inclusive and equitable.

### **7. How does the proposed program relate to the university's strategic plan?**

The Social Justice Alliance/Institute is one of the four pillars of the 2008 Strategic Plan, and the Minor is an outgrowth of the Social Justice Institute. As a multidisciplinary, multi-school program, the minor includes faculty and students from medicine, dentistry, public health, engineering, law, social work, and the social sciences and humanities. Central to our mission is educating students to become change agents in local, national and international arenas. The Director of the Institute is in conversation with other directors or leaders in social justice at other universities. We view the Minor as a key component of the SJI with the potential to increase diversity on campus and strengthen institutional resources.

### **8. How will the program contribute to CWRU's reputation regionally, nationally, and internationally?**

As outlined in our Social Justice Institute precis, an interdependent 21<sup>st</sup> century world requires exploration of the social, political, economic, technological, and scientific developments of our diverse and global society. Our academic program requires students to ponder hard questions: what are the impacts of these developments on all people, those with privilege and those without? What kind of society do we want to live in? What is social justice? While Social Justice centers and institutes are springing up at colleges and universities elsewhere, we believe our interdisciplinary curricular approach to the questions raised is truly distinctive. As our signature core course makes clear, we bring multiple views and academic perspectives to the academic table. Students are exposed to cross-disciplinary ways of thinking.

Furthermore, developing a new curricular model in social justice has potential application nationally and internationally. SJI is currently engaged in regional and national networking and development of new models for social justice-related work in higher education. The Minor is an important component of the Institute, and the distinctive interdisciplinary design has potential to enhance the reputation of the college and university. The SJI is the basis of a Case Study to be included in an anthology by Michael Austin in 2013. The chapter, by Rhonda Williams, is titled "A Case Within a Case: Social Justice for Active Citizenship." Finally, students who minor in Social Justice will be conducting applied research and become producers of knowledge, further contributing to CWRU's reputation on the regional, national and international social justice scene.

### **9. To what extent does the new program reflect a change of departmental priorities and subsequent reallocation of resources?**

Since the Minor program is a multi-school interdisciplinary program, the reallocation of resources for one specific department is minimal. However, the SJI Minor program relies upon college level support and benefits for the institute and its proposed goals.

**Social Justice Institute Curriculum Development Document**  
**SJ Minor Rubric**

**JUSTIFICATION FOR MINOR IN SOCIAL JUSTICE**

In the Spring of 2010, the CWRU Social Justice Institute (SJI) received funding from the Provost's Interdisciplinary Alliance Investment Grants which were created to advance the University's strategic, interdisciplinary priorities. SJI is a university wide institute whose mission is to advance education, research and community that inspire creative, sustainable, and just solutions to societal problems. The goals of SJI include:

- supporting innovative and synergistic research, scholarship and pedagogy;
- building and supporting social justice leaders;
- forging productive relationships across boundaries within the university and into the community.

In order to achieve the first and second goals, a key component of SJI's IAIG proposal was to address pedagogy and curriculum development in order to develop future social justice scientists, scholars, and leaders. To that end, recruitment of members to the Social Justice Institute's curriculum planning team began during Spring and Summer 2010. The planning team, which has representation from the SJI leadership team, the College, and six of the seven schools, began its work September 2010 and met almost every 2-3 weeks thereafter. The committee includes: Rhonda Y. Williams, SJI Director (CAS, History); David Crampton (MSASS); Susan Case (WSOM); Susan Hinze (CAS, Sociology); Marilyn Mobley, Vice President, Inclusion, Diversity & Equal Opportunity (SJI Leadership Team member and CAS, English); Marc Buchner (CSE); Elliot Posner (CAS, Political Science); John Flores (SJI Leadership Team member and CAS, History); Jennifer Madden (Graduate Student, WSOM); Diana Morris (SON); Scott Frank (SOM); Jonathan Entin (Law).

The proposed Social Justice Minor is the first phase of the broader effort to develop a university-wide curriculum, and by extension a signature identity, for CWRU in social justice studies at the undergraduate and graduate levels. Educating future leaders throughout the university is central to the vision and mission of the Social Justice Institute and its alliance-based work.

**Curricular Collaboration & Innovation**

Influenced by, and integrated with, the Social Justice Institute's other initiatives and collaborative approach, the foundation of the newly established Social Justice Minor is a cross-disciplinary, team-taught core course that will introduce students to social justice from a range of perspectives. While we have discovered commitment to and expertise in social justice across the schools, we have also come to realize that there are multiple views and academic perspectives on the meanings of social justice and how to promote it. An innovative component of this curriculum is the featured "signature core course," which will introduce students to this cross-disciplinary way of thinking at the outset and promote an intellectual culture of collaboration. This course will weave together the richly diverse contributions of scholars from different disciplines and schools.

**Student Appeal**

We share a sentiment expressed from the Office of the Provost and other forums at the University that Social Justice, as a topic and as a Minor, holds great appeal for students from different schools. Members of the curriculum committee have each related interest from students within their schools. For instance, in the School of Nursing, a significant lure for potential undergraduate students and parents is the 10-week community-based immersion

## **Social Justice Institute Curriculum Development Document**

### **SJ Minor Rubric**

experience that focuses on health policy and inequality, culture and ethics. The opportunity to incorporate nursing study in the social justice minor has the potential to be attractive to the same students. In Electrical Engineering and Computer Science within the School of Engineering, a significant cohort of students who were excited and intrigued by the possibility of a Social Justice minor. Recently, during a College of Arts & Sciences Open House, students and their parents explicitly expressed enthusiasm and interest in a Social Justice program of study.

In addition to this, focus group and survey research was conducted by students in School of Management Professor Susan Case's Managing Diversity and Inclusion class. The research was designed to assess the general CWRU student body interest in social justice as an undergraduate minor and graduate certificate program. Undergraduate students were drawn from the College of Arts and Sciences, Engineering, Nursing, and Weatherhead. With regard to the Social Justice undergraduate minor, strongest interest came from students in the humanities, social sciences, nursing, and WSOM. Many of these students wanted the program to include a field experience as well as international scope. They could see how such an emphasis would be helpful to them in their current areas of study.

Finally, the signature "Introduction to Social Justice" course was taught for the first time during Spring of 2012. Co-taught by Director of SJI, Dr. Rhonda Williams, and Cellar Professor of Nursing, Dr. Diana Morris, the course achieved a full enrollment with N = 18 student and further demonstrates the appeal of the program. Students in the class were from the first through fourth years, and from a range of academic backgrounds and majors. Several students were already engaged in an area of social justice, and were eager to learn more about developing problem-solving skills and strategies to apply in their areas of interest; such needs would be addressed through completion of the Social Justice Minor. In addition, most students from the SJUS 100 course expressed an interest in pursuing additional social justice coursework.

Assessing all of this information, the planning team believes that there is substantive existing interest in a Social Justice Minor that would enhance student exposure to social justice issues in the United States and throughout the world and that would develop their skills to become leaders and advocates of change. The team also believes that there is profound potential for teaching students, not fully convinced of its pertinence, about how social justice can enhance their personal, intellectual, and professional lives – no matter what their areas of study.

#### **Additional Knowledge and Skills**

The Minor program will provide students with opportunities to enhance their major and career choices through curricular efforts and learning experiences designed to help students develop knowledge, skills, and abilities to become thoughtful advocates and leaders of societal change.

#### **Cross-listed Courses & Providing New Frameworks**

For the social justice minor, the signature core course is the "new" foundational course. The minor will draw upon existing courses, not only cross-listing them with a social justice identified curricular designation, but strategically grouping those courses under broad areas of concentration to provide students with frameworks for understanding the interconnections between what are often perceived as disparate and disconnected fields of study and inquiry. New courses will be developed and offered as new affiliated Social Justice Institute faculty are hired (underway), and social justice curricular innovation mini-grant and "new scholars" programs are launched (in planning).

## Social Justice Institute Curriculum Development Document

### SJ Minor Rubric

#### **Academic Advisement for Minor in Social Justice**

As a pillar of the university's Forward Thinking strategic plan, the university wide Social Justice Institute (SJI) provides a venue and a creative model for supporting and encouraging pedagogical innovation and curriculum creation. A key component is the responsibility for academic advisement of undergraduate students pursuing a minor in social justice. Existing policy regarding academic advising roles states that academic/ departmental representatives who function as faculty advisors for majors and minors have "specific knowledge of the department; connection with faculty within a department, and knowledge of opportunities for engagement within the department; and familiarity with major/minor requirements" (<http://www.case.edu/provost/ugstudies/year1/FSEMVisitHandout.pdf>). Therefore, academic advisement of undergraduate students seeking a minor in social justice will be based in the Social Justice Institute (e.g. academic department)

The Director of the Social Justice Institute (or a duly appointed representative) will be responsible for academic advisement including the assignment of academic advisers from the Institute's participating faculty for students declaring a minor in social justice. The student will complete and sign a minor declaration form after meeting with the Director to obtain her/his signature and the name of the assigned faculty advisor. The student will then return the form to Office of Undergraduate studies in accordance with current procedures ([http://www.case.edu/bulletin/09-11/undergraduate\\_academic\\_advising.htm](http://www.case.edu/bulletin/09-11/undergraduate_academic_advising.htm)).

The faculty advisor and student will meet (in person, by telephone, or electronically) at least once a semester to discuss the student's minor plan of study and the student's progress, including participation in Institute activities. In addition, the advisor will work with the student to plan, supervise, and evaluate a capstone experience required for the social justice minor. If a student chooses to do his/her social justice capstone concurrently with a required major capstone, the social justice academic advisor will collaborate with the student and the student's major advisor in planning, approving, and evaluating the learning objectives and completion of the capstone activities.

### **THE CURRICULUM: THE SOCIAL JUSTICE MINOR PROGRAM**

#### **Mission**

The Social Justice Program prepares students across the university to address national and global inequities. The curriculum will emphasize history, theory, and practice of social justice; the distribution of power, resources, and opportunities; and appropriate individual and collective remedies for social injustices. Through cross-disciplinary study, dialogue, research, active community engagement, and advocacy and leadership development, the curriculum promotes understanding of one's place in and responsibility to community, country, and planet.

#### **Objectives**

The Social Justice program will offer courses and other learning experiences designed to help students become engaged, thoughtful, knowledgeable, and skilled citizens. The curriculum will provide students with the opportunities to integrate major and career choices with concerns about social justice. The following are the objectives:

## **Social Justice Institute Curriculum Development Document**

### **SJ Minor Rubric**

1. Students will describe competing perspectives concerning diversity, equality, fairness and human rights in historical and contemporary local and global contexts.
2. Students will evaluate a wide range of academic literatures focused on inequity, discrimination, and exclusion based on age, (dis)ability, ethnicity, gender, immigration status, national origin, race, social class, health status, educational experience, religion, and sexual identity.
3. Students will analyze the role of political and economic systems; power and privilege; and social movements in promoting change.
4. Students will distinguish how cultural practices, social relations, social structures (e.g., the class system), and institutions (e.g., education, religion, business, medicine and law), can reproduce, reduce or eliminate inequalities.
5. Students will examine the disparate consequences of the social and physical environment and available resources on human development and wellbeing.
6. Students will demonstrate skills to facilitate social change from diverse community, academic, and professional perspectives.
7. Students will critically assess their own understanding of social justice and be sensitive to that of others. This enterprise will include grappling with different ethical, philosophical, and religious traditions. Thus, students will become aware of their place in the world and develop the capacity for critical thinking about social justice.
8. Students will demonstrate the tools necessary to become engaged citizens and active participants in shaping the social world.

### **Minor Requirements**

19 total credits, including the required Signature Core Course, Capstone, and 1-credit “Real World Seminar Experience.” Students may count 2 courses toward both their Social Justice Minor and other academic requirements.

### **Developing a Field of Study**

Students will work with a Social Justice faculty advisor to create a program of study. Students will have an opportunity to examine the particular aspects of social justice that concerns them most. Two courses – the introductory signature core course and a capstone – are required (6 credits). For the remaining required credit hours, students will choose one course from each of the (3) three focus areas and an additional elective course from any area.

### **Signature Core Course: “Introduction to Social Justice: A Case Approach”**

Undoubtedly, there are multiple views and academic perspectives on the meanings of social justice and how to promote it. An innovative component of this curriculum is the featured “signature core course,” which will introduce students to this cross-disciplinary way of thinking at the outset. This team-taught core course features a case study and experiential learning approach that introduce students to social justice through a range of perspectives.

## Social Justice Institute Curriculum Development Document SJ Minor Rubric

### Capstone Experience

Students shall complete a capstone experience, applying the knowledge in their major field of study or within the social justice minor. The capstone experience should be developed and administered by the major adviser and the social justice faculty adviser. The SJ capstone experience should conform to the requirements for the SAGES capstone.

### Areas of Focus

Areas of focus were delineated based on the three broad areas of concentration to provide students with frameworks for understanding the interconnections between what are often perceived as disparate and disconnected fields of study and inquiry. Existing courses were initially reviewed for the potential to meet the SJ minor objectives. Course faculty of identified courses were asked if they wanted a specific course reviewed for inclusion in the minor. If faculty had an interest, they were asked to complete a survey monkey questionnaire regarding the goodness of fit with the SJ minor objectives. The SJ curriculum committee went through several iterations to review the course syllabus and survey monkey results that included a faculty statement of willingness to list their course and designate the appropriate focus area. The curricular review process is ongoing, and we expect additional courses to be added for approval. Several are in process, and some faculty New courses will be developed and offered as new affiliated Social Justice Institute faculty are hired (new hire Fall 2012), and social justice curricular innovation mini-grant and “new scholars” programs are launched in progress.

### **Focus 1: “Ethics, Politics, and Economics”**

Courses in this focus area draw upon classic and contemporary debates about the origins and evolution of economic, political, and societal arrangements as a starting point for addressing a series of pressing questions such as: Are the existing arrangements just? To what extent are they amenable to change? What are the preferred alternatives, and how can they be realized?

#### **APPROVED LIST OF COURSES**

*HSTY/ETHS 274 -- Race: The History of an Idea*

*PHIL 316 Topics in Philosophy--African Political Thought*

*PHIL 325/425 -- Philosophy of Feminism*

*PHIL 334/POSC 354/454 -- Political and Social Philosophy*

### **Focus 2: “Social Inequality, Power and Privilege”**

Courses in the social inequalities focus area explore the unequal distribution of social resources, and the practice and experience of discrimination, oppression, and exclusion based upon social statuses as a starting point for addressing a series of questions such as: What is a fair distribution of resources? How do cultural practices, social relations, social structures and institutions reproduce, reduce, or eliminate inequalities? What are the consequences of social inequality for health, development, and well-being of individuals and communities? How are distributions and uses of power connected to social inequalities?



**Social Justice Institute Curriculum Development Document**  
**SJ Minor Rubric**

**APPROVED LIST OF COURSES**

*ETHS/WGST/FRCH/ WLIT 335/435 Women in Developing Countries*  
*ETHS 352/WGST African Feminisms*  
*HSTY 208 -- Social History of Crime*  
*HSTY/WGST/ETHS 318 History of Black Women in the U.S.*  
*HSTY 363/463 -- Gender in America*  
*MPHP 306 -- History and Philosophy of Public Health*  
*ORBH 370 - Women in Organizations*  
*RLGN 207 Women and Religion*  
*RLGN 338/WGST 339: Black Women and Religion*  
*SOCI 262 -- Disability in Society*  
*SOCI 302 Race and Ethnic Minorities in American Society*  
*SOCI 326/WGST 326 -- Gender, inequalities, and Globalization*  
*SOCI 349 Social Inequality*  
*SOCI 355/455 -- Law, Social Policy, and Children's Rights*  
*SPAN 342 Feminist Voices in Latin American Literature*  
*WGST/SOCI 201 (x-listed ENGL/PHIL/HSTY/RLGN) -- Introduction to Women's and Gender Studies*

**Focus 3: Social Movements and Social Change**

This focus area centers on the role of collective action in creating social change. It provides students with a foundation in social movement theory and illustrates the significance of public dialogue and civic engagement. This focus will address a series of questions such as: What are competing models of social change? What role have social movements played in U.S. and global history? How do social movements form? How have states responded to social movements? What is the relationship between democracy and social movements? How have different technological innovations advanced or impeded social movements? What are the necessary knowledge and skills to implement social change?

**APPROVED LIST OF COURSES**

*HSTY/ETHS 280 -- History of Modern Mexico*  
*HSTY 381/481 -- City As Classroom*  
*POSC 322 -- Political Movements and Political Participation*  
*POSC 346/446: Women and Politics*  
*RLGN 325 Justice, Religion, and Society: Doing Peace and Justice in Cleveland*  
*SPAN 315 Latin American Cultural Conflicts*  
*SPAN 336/436 Chicano/a Literature and Identity*

**1-Credit Requirement: Real World Seminar Experiences (Pass/Fail)**

This Real World Seminar Experience element encourages students to attend out-of-classroom events on campus and in the community that relate to social justice, with a particular focus on topics and themes that meet the learning objective of the Minor. Social Justice Minors are expected to attend 8 lectures, workshops, and other events approved by their advisor.

The Real World Seminar Experiences course requires students to attend out-of-classroom events on campus and in the community that relate to social justice, with a particular focus on topics

## **Social Justice Institute Curriculum Development Document**

### **SJ Minor Rubric**

and themes that meet the learning objectives of the Minor. Social Justice Minors need to attend and report on at least eight of these events over the course of their Minor experience.

Prior to each Fall and Spring semester, the Social Justice Director will appoint one of the Social Justice Undergraduate advisers to coordinate the offering of the Seminar. It is expected that this role will rotate among the Social Justice advisers. If not faculty advisor is available to perform the coordinator's role during a particular semester, then the Director will perform this role by default.

The Seminar Coordinator will work with the Director to select a variety of on-campus and off-campus events that students can use to satisfy the seminar. When feasible these events will be publicized in advance on the Social Justice Institute's website on a web page devoted to the Seminar.

In addition, students may petition to have other events approved. Students will approve the following information: Event Date, Event Time, Event Location, Event Abstract, and a brief description of the Event's Relevance to the topic of Social Justice. The petitions will be forwarded to the Seminar Coordinator for approval.

It is also the Seminar Coordinator's function to maintain a student database that contains event records. The Event Records include an analysis of the event: a) justification; b) specific quotes that talk about the relevance of the program; and, c) raises questions regarding the program event. Each student's Seminar completion status and these reports will be sent to the students. Upon completion of the required eight events, the student will enroll in the next Seminar course to obtain credit.

**SJUS 200: Engagement Seminar: Experiential, Community Based Learning**  
**Case Western Reserve University**  
**Syllabus**

**Course Instructor:**

Professor Social Justice Institute Advisor

**Contact Information:**

XXX

*“Being good is easy, what is difficult is being just.”*

— Victor Hugo

*“Truth never damages a cause that is just.”*

— Mahatma Gandhi

**Course Description**

This one-credit seminar is designed to provide real life engagement with the community, and to facilitate student interaction with themes and topics that meet the learning objectives of the Social Justice Minor. Students will attend a set number of out-of-classroom events on campus and in the community to learn from community members, workers and leaders who are actively experiencing, educating about, and addressing social justice issues. Engagement in the community and with diverse stakeholders is necessary to developing awareness and sensitivity to the context and forms of justice and injustice within socio-political constructs. Further, direct engagement is necessary to begin to synthesize and integrate the knowledge and skills necessary to develop oneself as an active agent for change and responsible citizen. Therefore, emphasis will be placed on observing and analyzing the efficacy of strategies for individual resistance and social action.

**Course Objectives**

Attendance and participation at out-of-classroom events and real world experiences build on the substantive content of the minor core course, "SJUS 100 Introduction to Social Justice." In addition, student involvement at talks and events will facilitate preparation for the required Social Justice Capstone Project (SJUS 398).

A designated Social Justice Institute faculty advisor will approve 8 lectures, workshops and other events *over the course of the semester* that are deemed in line with the mission of the Social Justice Minor Program. In particular, approved events will help prepare students to address national and global inequities. Approved events will further our curricular mission: emphasis on history, theory and the practice of social justice; the distribution of power, resources and opportunities; and

individual and collective remedies for injustices. The cumulative impact of out-of-classroom experiences at local, national or international levels will promote understanding of one's place in and responsibility to community, country and planet.

Students may not receive credit for events required in other classes. On average, we expect students will spend about 16 hours total at the 8 approved events. A shorter event may have more impact than a longer event; therefore, our goal is 8 different lectures, workshops or events rather than a tally of hours. Those activities must be completed in one semester.

### **Grading**

Students must attend an approved event, and write up a critical reflection on the event. Completion of these requirements will result in a letter grade using the scale A-F. The assignment of grades is left largely to the discretion of the faculty advisor.

**SJUS 398: Social Justice Capstone Project**  
**Case Western Reserve University**  
**Syllabus**

<b><u>Course Instructor:</u></b>	<b><u>Contact Information:</u></b>
Professor TBA	XXX
<b><u>Meeting Time:</u></b>	<b><u>Meeting Location:</u></b>
TBA	TBA

*"The good we secure for ourselves is precarious and uncertain . . . until it is secured for all of us, and incorporated into our common life."*

*Jane Addams*

**Course Description**

SJUS 398 is the culminating, integrative course for the social justice minor. In this course, students will identify and develop a project that addresses a relevant justice issue. Students will apply knowledge from historical and theoretical justice frameworks, and emphasis is placed on critical analysis of the issue. Students will have the opportunity to engage with stakeholders in a community based immersion experience in local, national or international settings. This culmination course is designed to provide students with an opportunity to demonstrate foundational skills facilitating social change from diverse community, academic, and professional perspectives. Finally, students will work to select and perhaps implement remedies such as individual resistance, policy, advocacy and social action, and collective struggle to address the respective injustice.

**Course Objectives**

There are two major objectives.

**First**, in line with the objectives of the Social Justice Minor, the capstone is designed to facilitate and support synthesis and integration of social justice knowledge and skills through experiential learning and community engagement. Specifically, students will be aware of and incorporate objectives appropriate to their project from the following list:

1. Students will describe competing perspectives concerning diversity, equality, fairness and human rights in historical and contemporary local and global contexts.
2. Students will evaluate a wide range of academic literatures focused on inequity, discrimination, and exclusion based on age, (dis)ability, ethnicity, gender,

immigration status, national origin, race, socio-economics, health status, educational experience, religion, and sexual identity.

3. Students will analyze the role of political and economic systems; power and privilege; and social movements in promoting change.
4. Students will distinguish how cultural practices, social relations, social structures (e.g., the class system), and institutions (e.g., education, religion, business, medicine and law), can reproduce, reduce or eliminate inequalities.
5. Students will examine the disparate consequences of the social and physical environment and available resources on human development and wellbeing.
6. Students will demonstrate skills to facilitate social change from diverse community, academic, and professional perspectives.
7. Students will critically assess their own understanding of social justice and be sensitive to that of others. This enterprise will include grappling with different ethical, philosophical, and religious traditions. Thus, students will become aware of their place in the world and develop the capacity for critical thinking about social justice.
8. Students will demonstrate the tools necessary to become engaged citizens and active participants in shaping the social world.

**Second**, in line with the SAGES capstone requirements, SJUS 398 will include critical thinking, regular oversight by instructor, periodic written and oral reporting of progress, a final written report describing the project activity, and a final public presentation.

### **Grading**

SJUS 300 is part of the General Education Requirements of the university and therefore must result in a letter grade using the scale A-F.

### **Required Readings: TBD.**

Students are required to read foundational theoretical and methodological works relevant to their project, as well as the substantive literature on their specific social justice topic.

**CWRU Action Form for Majors/Minors/Programs/Sequences/Degrees**  
14-CSE-PAF-1090

Docket #

(instructions on back)

College/School: Case School of Engineering

Department: Members of the Data Science and Analytics Faculty

PROPOSED:  major  
 minor  
 program  
 sequence  
 degree

TITLE: Applied Data Science

EFFECTIVE: Fall (semester) 2014 (year)

**DESCRIPTION:**

**Background:**

This undergraduate Minor in Applied Data Science (ADS) is based in the Case School of Engineering, and available as a minor to students across CWRU. The ADS Minor will be an important complement to the DSA Major being developed in the Electrical Engineering and Computer Science department of CSE.

The minor is directed to students studying in the domains of Engineering and Physical Sciences (including Energy and Manufacturing), Health (including Translational and Clinical), and Business (including Finance, Marketing, and Economics). Successful completion of the ADS minor requirements leads to a “Minor in Data Science and Analytics” for the graduating student.

The ADS minor represents that the students have developed knowledge of the essential elements of Data Science and Analytics in the area of their major (their domain of expertise). A year long, cross university CWRU research project on data science needs in industry and society showed many educational opportunities for CWRU in this area. The research, data, and findings from this effort are in the supplementary documents in the appendix and are discussed in the Minor Justification.

**Elements of the DSA minor:**

The minor is structured so that the students who qualify for the minor have a working understanding of the basic ADS tools and their application in their domain area. This includes: 1. Data Management: datastores, sources, streams; 2. Distributed Computing: local computer, distributed computing such as hadoop or other cloud computing; 3. Informatics, Ontology, Query: including search, data assembly, annotation; and 4. Statistical Analytics: tools such as R statistics and high level scripting languages (such as Python).

Students will develop comprehensive experience in the steps of data analysis. Step 1: define the ADS questions, and Step 2: identify, locate, and/or generate the necessary data, including defining the ideal data set and variables of interest, determining and obtaining accessible data and cleaning the data in preparation for analysis. These are followed by Steps 3 through 6. Step 3: exploratory data analysis to start identifying the significant characteristics of the data and information it contains. Step 4: statistical modeling and prediction, including interpretation of results, challenging results, and developing insights and actions. Step 5: synthesizing the results in the context of the domain and the initial questions, and writing this up. And finally Step 6: the creation of reproducible research, including code, datasets, documentation and reports, which are easily transferable and verifiable.

The curriculum is based on five, 3 credit, courses, progressing from Level 1 to Level 5, which cover the spectrum of learning needed to achieve domain area expertise in data science and analytics. The courses are chosen to be both cross cutting, *i.e.*, intermixing students from across the university in the fundamental ADS concepts such as scripting and statistics (Levels 1,2, and 4), and domain area focused (Levels 3 and 5). In addition, Level 4 allows for UG research experience of data science and analytics, in the students’ domain area. This meets the 15 credit requirement of a minor.

The ADS minor is a single minor that can be attained by students whose majors are in many different

departments and schools. Their major helps to define their domain area of expertise, and their ADS minor represents their familiarity and learning of the methods of Data Science and Analytics applied in their domain area. The current domain foci can be organized into Engineering and Physical Sciences (e.g., with domain of Astronomy), Energy and Manufacturing, Health (e.g., Translational or Clinical), and Business (e.g., Finance or Marketing).

The data types found in these domains are diverse. They include time series and spectral data for Energy and Astronomy, and sensor and production data and image and volumetric data for Manufacturing. In Health, Translational DSA includes Genomic, Proteomic and other Omics data, while Clinical DSA includes patient data, medical data, physiological time series, and mobile data. Business data types include financial and economic data for Finance, and operations and consumer behavior data for Marketing.

**Justification:**

See attached Justification, and associated appendices.

This Minor in Applied Data Science is part of the CWRU/BHEF initiative in Undergraduate Data Science, which includes a Data Science and Analytics Major and this Applied Data Science Minor

Is this major/minor/program/sequence/degree:  new  
 modification  
 replacement

If  modification  or  replacement  please  elaborate:

Does this change in major/minor/program/sequence/degree involve other departments?  Yes  
 No

If yes, which departments?  It involves the Data Science and Analytics Faculty, who are from many departments and many schools, including CSE, CAS, SOM, SON, WSOM \_\_\_\_\_

Contact person/committee:  Roger H. French  *Roger H. French*

**SIGNATURES:**

<b>DATE</b>			
<b>Department</b>	James McGuffin-Cawley	<b>Curriculum</b>	<b>Chair(s)/Program</b>
_____	<small>Digitally signed by James McGuffin-Cawley, DN: cn=James McGuffin-Cawley, o=Cas Western Reserve University, ou=Materials Science, email=jmccawley@case.edu, c=US, Date: 2014.04.20 10:48:26 -0500</small>	_____	_____
<b>Department</b>			<b>DATE:</b>
_____		Mark R. De Guire	<small>Digitally signed by Mark R. De Guire, DN: cn=Mark R. De Guire, o=Cas Western Reserve University, ou=Department of Materials Science and Engineering, email=mrde@case.edu, c=US, Date: 2014.04.20 11:33:50 -0500</small>

College/School \_\_\_\_\_ Curriculum \_\_\_\_\_ Committee \_\_\_\_\_ Chair: \_\_\_\_\_  
 Jing Li (please see attached email for approval)

College/School \_\_\_\_\_ Dean(s): \_\_\_\_\_  
 Gary Wnek (please see attached email for approval)

UUF \_\_\_\_\_ Curriculum \_\_\_\_\_ Committee \_\_\_\_\_ Chair: \_\_\_\_\_

File copy sent to:  Registrar  Office of Undergraduate Studies/Graduate Studies  
 Other: \_\_\_\_\_



**From:** Jing Li [mailto:jingli@cwru.edu]

**Sent:** Wednesday, April 30, 2014 9:28 AM

**To:** Gary Wnek; Jeffrey Wolcowitz

**Cc:** Roger French; Kathleen Ballou; Alexis Schilf; Anirban Sen Gupta; Camila Estrada; Jing; Kurt Rhoads; LaShanda Korley; Peter Lagerlof; Rohan Akolkar; Scott Hardy; Dwight Davy

**Subject:** approval of the ADS minor

Dear all,

Based on the feedback from a majority of our committee members, the committee has approved the minor.

Specific comments about course options at each level will be discussed afterwards.

Kathleen,

Is this email sufficient or do you need my signature on the PAF?

--

Jing Li, Ph.D.

Associate Professor

[Computational Biology lab @ Case](#) (PI)

Department of Electrical Engineering and Computer Science

Case Western Reserve University

**From:** Gary Wnek [mailto:gew5@case.edu]  
**Sent:** Sunday, April 27, 2014 7:38 PM  
**To:** Roger French  
**Cc:** Kathleen Ballou; Jing Li  
**Subject:** Re: Applied Data Sciences Minor Action Form

Kathleen can sign for me as I am in England all week.

On Apr 27, 2014 11:41 PM, "Roger French" <[rxfl31@case.edu](mailto:rxfl31@case.edu)> wrote:  
Hi Jing,

Hows headway on signing off on the ADS Minor Action Form by the CSE UG Comm.

After that it goes to Gary Wnek, and then its to Jeff Wolcowitz.

**Approvals by Department Chairs, whose courses are part of the DSA Minor**

Jim McGuffin Signature on Minor Action Form Page  
EMSE: Materials Science and Engineering, CSE: Jim McGuffin-Cawley

Hi Roger: It is OK to list ENGR 131, EECS 132 and the new course EECS 133  
(which requires approval) in the list of courses for the Data Science minor. Ken  
EECS: Electrical Engineering and Computer Science, CSE: Ken Loparo

SYBB: Systems Biology, SOM: Mark Chance



MAMS: Mathematics, CAS: Daniela Calvetti



ASTRO: Astronomy, CAS: Chris Mihos



## **Justification for Minor in Applied Data Science (ADS)**

CWRU and the Business Higher Education Forum initiated a Data Science Workforce Project in July 2013 under the leadership of President Barbara Snyder and Provost Bud Baeslack (Appendix I).

The need for education in Data Science in higher education has been established by this project. Companies of all sizes are using data science and analytics. From the BHEF 2014 Winter Data Science Overview:

“A 2011 report by McKinsey Global Institute, *Big Data: The Next Frontier for Innovation, Competition, and Productivity*, noted that “big data” is growing at a rate of 40 percent each year and has the potential to add \$300B of value to the nation’s health care industry alone, with broad application in virtually every sector, as well as scientific organizations and cultural institutions. Projections by Gartner, Inc., indicate that in less than 12 months, 4.4 million IT jobs to support big data will be created globally. About 1.9 million of those jobs will be within the United States, ***and big data has the potential to create three times that number of jobs outside of IT.***” [Emphasis added.]

This project did research on the needs for Data Scientists and the activities at CWRU and peer institutions (Appendix II). In November 2013, an industry roundtable workshop was held on campus to address the needs and demand for Data Scientists and what skill sets and areas of expertise were considered important. (Appendix III).

From this work, Case Western Reserve University and the Case School of Engineering committed to launch Data Science and Analytics Programs. (Appendix IV). In collaboration with corporate partners, Case Western Reserve University is working to launch a degree program in Data Science. The major is to be housed in EECS in the Case School of Engineering and will include a core curriculum of statistics, database systems, data visualization, data privacy, and other data analytics.

The BHEF Data Science Overview (Appendix V) goes on to say that “(w)hile there is a considerable need nationally for data scientists, ***there is an even greater workforce need for the analytics-enabled professional who can marry a deep background in a particular field (e.g., engineering, economics, or business) with a strong understanding of the applications of analytics and visualization tools.***”

The ADS minor will fulfill this need for students with Data Science capabilities who intend to major in fields other than Computer Science, such as Materials Science, Nursing, Management, or Arts and Sciences. The students who graduate with the ADS Minor, will be domain experts with a foundation in the application of Data Science in the domain of their major. Courses will

be available across the university with initial offerings in WSOM, FPBSON, and CAS, in addition to CSE.

### **The Curriculum: Minor in Applied Data Science**

The minor is structured so that the students who qualify for the minor have a working understanding of the basic ADS tools and their application in their domain area. This includes: 1. Data Management: *i.e.*, datastores, sources, streams; 2. Distributed Computing: local computer, distributed computing such as hadoop or other cloud computing; 3. Informatics, Ontology, Query: including search, data assembly, annotation; and 4. Statistical Analytics, including tools such as R statistics and high level scripting languages (such as Python).

Students will develop comprehensive experience in the steps of data analysis. Step 1: define the ADS questions, and Step 2: identify, locate, and/or generate the necessary data, including defining the ideal data set and variables of interest, determining and obtaining accessible data and cleaning the data in preparation for analysis. These are followed by Steps 3 through 6. Step 3: exploratory data analysis to start identifying the significant characteristics of the data and information it contains. Step 4: statistical modeling and prediction, including interpretation of results, challenging results, and developing insights and actions. Step 5: synthesizing the results in the context of the domain and the initial questions, and writing this up. And finally Step 6: the creation of reproducible research, including code, datasets, documentation and reports, which are easily transferable and verifiable.

### **Minor Requirements**

The curriculum is based on 5 courses, progressing from Level 1 to Level 5, which cover the spectrum of learning needed to achieve domain area expertise in data science and analytics. The courses are chosen to be both cross cutting, *i.e.*, intermixing students from across the university in the fundamental ADS concepts such as scripting and statistics (Levels 1,2, and 4) and domain area focused (Levels 3 and 5). In addition, Level 4 allows for UG research experience in the students' domain area.

The ADS Minor consists of three cross cutting core courses at Levels 1, 2, and 4 and two domain focused courses (3, 5). Each of these courses is 3 credits, to meet the 15 credit hour requirement of a minor. For the level 4 UG research course, the research topic will be approved by the ADS minor advisor, and will also be a 3 credit project. This will provide ADS minor students both the domain focused ADS learning they need, and a broadening perspective on applications, methods, and uses of ADS in other domain areas.

Level	Physical Sciences & Engineering			Health		Business		
	Physical Sciences	Energy	Manufacturing	Translational	Clinical	Finance	Marketing	Economics
5.	<b>ASTR 306:</b> Astronomical Techniques	<b>EMSE 354*</b> Data Science Modeling and Prognostics for Energy	<b>EMSE 367*</b> Modeling and Prognostic Data Science for Manufacturing	<b>SYBB 459</b> Bioinformatics for Systems Biology	<b>SYBB 322**</b> Clinical Informatics at the Bedside and Bench Part 2		<b>MKMR 308</b> <u>Measuring Marketing Performance</u> <b>MKMR310</b> Marketing Analytics	
4.	<b>EMSE 325:</b> Undergraduate Research <b>SYBB/BIOL 388:</b> Undergraduate Research in Biology <b>ASTR 369:</b> Undergraduate Research in Astronomy							
3.		<b>EMSE 353*</b> Data Science for Energy: Data Sources, Assembly, and Exploratory Data Analysis	<b>EMSE 366*</b> Exploratory Data Science for Manufacturing: Data Sources, Assembly, and Exploratory Data Analysis	<b>SYBB 311** A-D</b> A- Technologies in Bioinformatics B- Data Integration in Bioinformatics C- Translational Bioinformatics D- Programming in Bioinformatics	<b>SYBB 321**</b> Clinical Informatics at the Bedside and Bench Part 1		<b>MKMR 201</b> Marketing Management	
2.	<b>STAT 201:</b> Basic Statistics for Social and Life Sciences <b>STAT 312:</b> Basic Statistics for Engineering and Science <b>SYBB 210**:</b> Statistics and Tools for Data Science							
1.	<b>ENGR 131</b> Elementary Computer Programming <b>EECS 132:</b> Introduction to Programming in Java <b>EECS 133*:</b> Programming for Data Science							

\* CAF in preparation, \*\* CAF submitted for approval (4xx level already exists)

## Cross-listed Courses Counted Toward ADS Minor Requirements

Established courses ready to be included in the ADS Minor are found in CAS (Mathematics, Astronomy, Philosophy); CSE (Materials Science, Electrical Engineering and Computer Science, Manufacturing), SOM, SON, and WSOM (Business and Finance).

Each of the courses that meet the requirements for the ADS Minor can also be taken by students to meet requirements in Major programs, and therefore serve a dual purpose in our academic offerings. Even though each program, department and school may have its own criteria on whether a given course could be “double counted” towards major and minor requirements.

### Level 5:

**ASTR 306:** Astronomical Techniques

**EMSE 354\*:** Data Science Modeling and Prognostics for Energy

**EMSE 367\*:** Modeling and Prognostic Data Science for Manufacturing

**SYBB 459:** Bioinformatics for Systems Biology

**SYBB 322\*\*:** Clinical Informatics at the Bedside and Bench Part 2

**MKMR 308:** Measuring Marketing Performance

**MKMR 310:** Marketing Analytics

### Level 4: (Subject to approval by DSA minor advisor)

**EMSE 325:** Undergraduate Research

**SYBB/BIOL 388:** Undergraduate Research in Biology

**ASTR 369:** Undergraduate Research in Astronomy

### Level 3:

**EMSE 353\*:** Data Science for Energy: Data Sources, Assembly, and Exploratory Data Analysis

**EMSE 366\***: Exploratory Data Science for Manufacturing

**SYBB 311\*\* A-D**, A- Technologies in Bioinformatics, B- Data Integration in Bioinformatics, C- Translational Bioinformatics, D- Programming in Bioinformatics

**SYBB 321\*\***: Clinical Informatics at the Bedside and Bench Part 1

**MKMR 201**: Marketing Management

**Level 2:**

**STAT 201**: Basic Statistics for Social and Life Sciences

**STAT 312**: Basic Statistics for Engineering and Science

**SYBB 210\*\***: Statistics and Tools for Data Science

**Level 1:**

**ENGR 131** Elementary Computer Programming

**EECS 132**: Introduction to Programming in Java

**EECS 133\***: Programming for Data Science

\* CAF in preparation, \*\* CAF submitted for approval (4xx level already exists)

**Domains**

The ADS minor is a single minor that can be attained by students whose majors are in many different departments and schools. Their major helps to define their domain area of expertise, and their DSA minor represents their familiarity and learning of the methods of Applied Data Science in their domain area. The current domain foci can be organized into Engineering and Physical Sciences (*e.g.*, with domain of Astronomy), Energy and Manufacturing, Health (*e.g.*, Translational or Clinical), and Business (*e.g.*, Finance or Marketing).

The data types found in these domains are diverse. They include time series and spectral data for Energy and Astronomy, and sensor and production data and image and volumetric data for Manufacturing. In Health, Translational ADS includes Genomic, Proteomic and other Omics data, while Clinical ADS includes patient data, medical data, physiological time series, and mobile data. Business data types include financial and economic for Finance, and operations and consumer behavior data for Marketing.

**Applied Data Science Minor Initiating Faculty**

The ADS Minor is based in the Case School of Engineering, and is founded by the initial ADS Minor Faculty from schools across the university. The current members of the ADS Minor Faculty are as follows.

	ADS Faculty	
Name	Dept.	School
Roger French	EMSE	CSE
GQ Zhang	EECS	CSE

Jim McGuffin-Cawley	EMSE	CSE
Alexis Abramson	EMAE	CSE
Mark Chance	SysBio	SOM
Colin Drummond	Healthcare IT and Informatics	SON
Jagdip Singh	Design & Innovation	WSOM
Robin Dubin	Economics	WSOM
William Mahnic	Finance	WSOM
Jennifer Carter	EMSE	CSE
Chris Mihos	Astronomy	CAS

### **Academic Advisement for Minor in Applied Data Science**

Existing policy regarding academic advising roles states that academic / departmental representatives who function as faculty advisors for majors and minors have “specific knowledge of the department; connection with faculty within a department, and knowledge of opportunities for engagement within the department; and familiarity with major / minor requirements”. Therefore, academic advisement of undergraduate students seeking a minor in ADS will be based in the departments of the faculty teaching courses in the minor.



# **Applied Data Science**

## **Minor Action Form**

### **Appendices**

Appendix I. Case Western Reserve University and Business Higher Education Forum Data Science Workforce Project

Appendix II. Data Science Matrix for Case Western Reserve University Peer Institutions

Appendix III. Data Science Industry Roundtable – Monday, November 4, 2013: Summary

Appendix IV. Project Statement: New Undergraduate Degree Program in Data Science

Appendix V. BHEF Winter 2014 Meeting: Data Science Overview

Appendix VI. Key Word Glossary: Data Science & Analytics

Appendix VII. Syllabi



## **Case Western Reserve University and Business Higher Education Forum Data Science Workforce Project**

Companies and governments use data science and advanced analytics to drive innovation, shape strategy and inform decision-making.

The field of **data science** addresses this need. Combining mathematics, statistics, data engineering, computing and other disciplines, data science uncovers competitive advantages, new opportunities, customers' needs, or previously unforeseen challenges.

Imagine what data science could mean to your business.

Our faculty has, and Case Western reserve is responding with new undergraduate programs in data science. Numerous studies underscore the need:

- McKinsey Global Institute predicts a **nationwide shortage of 140,000 to 190,000 workers** with "deep analytical skills," and a **deficit of 1.5 million managers** capable of using big data analytics for actionable insights in their decision-making.
- McKinsey predicts a **40 percent annual growth in global data** and **\$300 billion in potential value-add** of data analytics to the nation's health care industry alone.
- Gartner Inc. indicate that by 2015, **4.4 million information technology jobs** globally will be created to support data science and analytics, generating **1.9 million IT jobs** in the U.S.,
- The U.S. government anticipates a **shortage of about 50,000 qualified workers** in health IT between 2010 and 2015. Healthcare companies are increasingly borrowing technology specialists from other industries.

Case Western Reserve is collaborating with the Business-Higher Education Forum to create exciting programs in data science, and we need your help. What skills do you need from our graduates? How can we tailor our program to best meet your needs? We seek you input on our curriculum and your support for research internship and co-op opportunities for students at your organization.

Collaboration with corporate partners is a powerful tool. We recently launched three new master's programs in our School of Engineering based on feedback from 60 companies. We aim to replicate that success here, while creating a national model for undergraduate education in data science.

***About Case Western Reserve University***

*Case Western Reserve University is one of the country's leading private research institutions. Located in Cleveland, we offer a unique combination of forward-thinking educational opportunities in an inspiring cultural setting. Our leading-edge faculty engage in teaching and research in a collaborative, hands-on environment. Our nationally recognized programs include arts and sciences, dental medicine, engineering, law, management, medicine, nursing and social work. About 4,200 undergraduate and 5,600 graduate students comprise our student body. Visit [case.edu](http://case.edu) to see how Case Western Reserve thinks beyond the possible.*

***About the Business-Higher Education Forum***

*Now in its 35th year, BHEF is the nation's oldest membership organization of Fortune 500 CEOs and research university presidents dedicated to advancing innovative education and workforce solutions and improving U.S. competitiveness. BHEF's business and academic members collaborate in regions across the country to design and deploy education-workforce solutions in the high-demand and emerging fields that are so critical to innovation and national security. BHEF and its members drive change locally, work to influence public policy at the national and state levels, and inspire other leaders to act.*



*Creating Solutions.  
Inspiring Action.*

## Data Science Matrix for Case Western Reserve University Peer Institutions

October 30, 2013

## Methodology

- Worked with CWRU to develop list of 22 peer institutions
- Collected data on Degree Programs, Departments, Centers, and Courses supporting data science
  - o searched for terms “data science,” “data analytics,” “data mining,” and “informatics” for each university
  - o searched through relevant program curriculums and courses for each university
  - o conducted university-specific searches based on data science research expertise

## Peer Matrix is a Work in Progress...

- Many university websites are difficult to navigate
  - Course listings were occasionally password protected or not centrally located for a department
  - Centers/Institutes rarely listed in a central location
- Data science courses scattered throughout University
  - Difficult to find courses with field-specific data science courses (e.g., in social science or astronomy)
- Names of industry partners not usually recognized on University websites
  - May require specific searches to find industry partners



## Commonly Offered Courses in Data Science

- To create an data science expert graduate, there are several “core” courses that are offered at multiple institutions
  - o data structures
  - o database systems
  - o data mining
  - o statistics
  - o computer vision
  - o machine learning
- To create a data science enabled graduate, there are a few “core” courses that are offered at multiple institutions
  - o business analytics
  - o bioinformatics
  - o health informatics
  - o computational biology
  - o genomics

## Conclusions on Data Science Programs

- Nearly all data science courses are located within the Computer Science Department
  - Other common choices include Information Science; Computer Science & Engineering; Bioinformatics; School of Business
- Nearly all data science education is targeting the graduate level
  - Undergraduate education targets upper-level students
- Courses and curriculum vary significantly across institutions
  - Data science programs support research interests/strengths of university
- No clear common understanding of a “data science training/education” at the undergraduate or graduate level
  - At graduate level, training/education is highly field specific



## Implications for CWRU

- CWRU has the opportunity to be a national leader in defining a “core” curriculum in data science, particularly at the undergraduate level
  - Foundational topics could include statistics, database systems, data visualization, pattern recognition, data privacy, data analytics
- Data science concentrations within current disciplinary areas can create a significant number of “data science enabled” graduates
  - Inclusion of a hands-on learning experience, such as a co-op or internship, demonstrates to employers that graduates have applicable skills
- CWRU can build on its strengths to expand data science education/training and create ties with industry
  - Health sector represents a critical area of comparative advantage for Cleveland and Northeastern Ohio
  - Other sectors in Cleveland also have a strong demands in data science

Higher Education	School/ College/	Centers/Institutes/Programs	Major/ Minor/ Certificate	Special Topics Areas	Courses Included	Cohort Size	Lecture	Funding or Partnerships
Boston University	Computer Science; Biology; Epidemiology (graduate)		Concentrations within Computer Science BS, MS, PhD; Graduate certificate in Database Management and Business Intelligence; Graduate certificate in Health Informatics;	bioinformatics; biostatistics; computational biology; systems biology;	introduction to databases and data mining; introduction to database systems; data mining; pattern matching and pattern detection; machine learning; database applications; biological database systems; statistical pattern recognition; advanced statistical methods; mathematical and statistical methods of bioinformatics; data structures and basic algorithms;		Database and data mining reading group	
Case Western Reserve University	Biology; Biomedical Engineering; Electrical Engineering and Computer Science; Epidemiology and Biostatistics: Genetics:	Cancer Center; Center for Proteomics and Bioinformatics	PhD in Information Systems; MS in Wireless Health; MS in Biology and Bioinformatics; PhD in Biology and Bioinformatics	informatics; bioinformatics; computational and molecular biology; translational bioinformatics: health				
Carnegie Mellon University	School of Information Systems and Management; School of Public Policy and Management; Department of Biomedical Engineering; Machine Learning Department (used to be Center for Automated	iLab (interdisciplinary research center including Department of Statistics, Department of Machine Learning, School of Computer Science and Tepper School of Business); Living Analytics Research Center; Center for Future of Work; Center for Bioimage Informatics (graduate education and undergraduate research internships); Lane Center for Computational Biology	Master of Information Systems Management (MISM) with concentration in Business Intelligence and Data Analytics; Master of Entertainment Industry Management (MEIM); MS in Health Care Policy and Management; MS in Biotechnology and Management; MS in Medical Management; MS in Information Technology Systems with a concentration in Big Data and Analytics; PhD in Machine Learning; Undergraduate minor in Machine Learning	predictive modeling; GIS mapping; data visualization; social media; health informatics; search engines and web mining; information retrieval; bioinformatics; artificial intelligence; computer vision; language technologies; neural	distributed systems; database management; object oriented programming in Java, data mining, analytics & business intelligence; data warehousing; digital transformation; measuring social; applied econometrics; data analysis in health fields; business process modeling; large scale data analysis; text analytics; MEIM courses include database management; decision analysis; IT management, technology policy; machine learning and policy; statistical theory for social and policy research; event and pattern detection; data analysis for managers; information systems for managers; large scale data analysis for public policy; health care information systems; SAS for policy management; business intelligence and data mining SAS; introduction to Raster GIS; algorithms and data structures for Information processing; data structures; data mining; data warehousing; exploring and visualizing data; multimedia		Database seminar series, CyLab seminar series	Many informal relationships for internships; \$560,000 gift of equipment from IBM Corp for CALD
Columbia University	Offered jointly through Graduate School of Arts and Science and School of Engineering and Applied Science	Institute for Data Sciences and Engineering (comprised of Center for New Media, Center for Health Analytics, Center for Financial Analytics, Center for Foundations of Data Science, Center for Smart Cities, Center for Cybersecurity)	Certification of Professional achievement in Data Sciences; MS to begin enrolling fall 2014; PhD fall 2015; not open to currently enrolled Columbia students for credit		algorithms for data science; probability and statistics; machine learning; exploratory data analysis and visualization; data engineering; statistical inference and modeling; data science capstone course; introduction to data science (team taught with Google employee).	First class enrolled fall 2013; hiring 30 new faculty and up to 75 new faculty	Monthly colloquium series	Part of NYC's Applied Sciences NYC initiative; NYC provided \$15M in financial assistance
Emory University	Business School (Information Systems and Operations Management or Marketing Concentration); School of Medicine Department of Biomedical Informatics; Math/Computer Science Biomedical Informatics	Marketing Analytics Center; Center for Comprehensive Informatics; Biomedical Informatics Program (collaborative effort of Emory University, Morehouse School of Medicine, and Georgia Institute of Technology focused on linkages and integration of translational and clinical/health systems such as existing and new electronic records systems,	MBA focus area; BBA focus area; PhD and MS in Biomedical Informatics, MPH or PhD in Public Health; PhD in Pathology Informatics	imaging informatics; clinical and translational research informatics; high-end computing for informatics/analytics/big data	data and decision analytics; consulting simulation analysis; data analytics and visualization; foundations of digital markets; health care operations and technology management; business forecasting and predictive analysis; analytics for e-markets; management science in spreadsheets; marketing analytics; database systems; introduction to biomedical informatics; exascale data analytics; high performance computing; advanced database systems; database mining; biomedical image analysis; introduction to clinical analytics; principles of public health informatics; management principles for informatics; geographic information systems; statistical methods; biostatistical methods; applied linear models; fundamentals of machine learning; machine learning and computational biology, modern regression analysis.			
Georgia Tech	College of Computing (Department of Computational Science and Engineering);	Institute for Data and High Performance Computing; Georgia Tech Research Institute; Foundations on Data Analysis and Visualization Analytics Research	MS or PhD in Computational Science and Engineering; MS or PhD in Electrical and Computer Engineering	machine learning; bioinformatics	data and visual analytics; computational data analysis; high performance computing; web search and text mining; pattern matching; computer visualization techniques; computational statistics; financial data analysis; data mining and statistical learning; algorithms for bioinformatics and computational biology; computability, algorithms, and complexity; high			
Lehigh University	College of Engineering (Computer Science and Engineering)		BS, MS, or PhD in Computer Science and Engineering (concentrations in artificial intelligence, bioinformatics, computing		pattern recognition; data mining; bioinformatics; database systems; biomedical image computing modeling			
Massachusetts Institute of Technology	Computer Science, Electrical Engineering and Computer Science, Sloan School of Management	Computer Science and Artificial Intelligence Laboratory (CSAIL)	BS, MS, PhD Computer Science; BS, MS, PhD in Electrical Engineering and Computer Science; MS, PhD in Biomedical Informatics; MS in Management Science; Minor in Management Science; MBA or MS in Management; MS in Finance; MS in Management and Engineering;	finance; medicine; social media; security	artificial intelligence; robotics; machine vision; human intelligence; data structures; machine learning; medical artificial intelligence; health informatics; processing, analyzing, and visualizing data; data mining; artificial intelligence; machine learning; robotics, inference and information; algorithms for inference; information theory; computational systems biology; human intelligence enterprise; computational cognitive science; database systems; cognitive robotics; distributed algorithms; advances in computer vision; cryptography and cryptanalysis			Intel Science and Technology Center for Big Data at CSAIL; AIG; EMC; Intel; SAP; Thomson Reuters

New York University	Business School; Biology; Mathematics; Computer Science; Physics; Economics; Statistics	Initiative in Data Science and Statistics	MS in Data Science (first cohort started in fall 2013); MS in Applied Urban Science and Informatics; MA in Applied Quantitative Analytics; MBA with a Specialization in Business Analytics; MS in Business Analytics; MS in Applied Statistics for Social Science Research; PhD in Biostatistics; MS in Scientific Computing Data; PhD in Computer Science (Machine learning/Artificial Intelligence Specialization); PhD in Statistics; Advanced Certificate in Applied Urban Science and Informatics; MS of PhD in Information Systems; MS or PhD in Mathematics; MS or PhD in Biology; MA in Economics; MS or PhD in Physics; PhD in Music Technology	developing and utilizing automated methods of analyzing data	data science; statistical and mathematics methods; machine learning and computational statistics; big data; inference and representation			
The Ohio State University	College of Medicine (biomedical Informatics); College of Engineering (Department of Computer Science and Engineering and Department of Electrical and Computer	Discovery Themes Initiative (ten-year, multi-million dollar investment designed to help Ohio State attract new tenured and tenure-track faculty in the Discovery Theme areas, using data analytics as a foundational tool for tackling the challenges within their Theme);	MS, PhD, MPH, in Biomedical Informatics; MS, BS,BA, or minor in Computer and Information Science; BS or MBA (Business Administration with Information Systems, Business Analytics, or Management Sciences option); BS (Electrical and Computer Engineering); PhD in Biostatistics	integration of large-scale data analysis; management, processing, and visualization with biomedical informatics; modeling and problem solving with spreadsheets	introduction to bioinformatics; biomedical informatics; imaging informatics; research informatics; database systems; advanced database management systems, data structures and algorithms; pattern recognition and machine learning, computer vision; regression analysis; multivariate analysis; Bayesian analysis; statistical analysis of genetic data; introduction to genomic methods; analysis of high content and high throughput data for neuroscience; invitation to probability; statistical phylogenetics; business analytics; business statistics; decision sciences; information systems planning and management			
Penn State University	Statistics; Computer Science & Engineering; Information Sciences & Technology; Geography; Political Science; Sociology; Anthropology; Economics;	IGERT Program in Big Data in Social Science; "Hacking Science" Blog to cover coding, big data, and science at Penn State; Institute for Cyber Science (uses computational cyberscience in areas of Energy and the Environment, Life Sciences, Materials, and Social	PhD or PhD minor in Social Data Analytics; MS or PhD minor in Computational Cyberscience; Graduate certificate in Applied Statistics (online)	social science	analytics; data mining; machine learning; visual analytics; social data analytics; privacy in statistical databases; big social data and the law; the information environment; data privacy; learning and games; network science; vision-based tracking; computational regularity; large data sets; pattern recognition; web analytics; spatial analysis; information retrieval and organization; statistics; social network analysis; democratic representation: big data approaches; spatial demography; geospatial science in anthropology; biological data analysis; networks in life science; concurrent scientific computing; concurrent matrix			
Rensselaer Polytechnic Institute	Information Technology; School of Management;	Data Science Research Center; Exploratory Center for	BS, MS, or PhD minor in Information Technology and Web Science; MS in Business analytics		information systems for management; data resource management; knowledge discovery with data mining; predictive analytics using social media;technology fundamentals for business	Launched September 2013	monthly seminars	GE Global Research; IBM
Stanford University	Statistics; Computer Science; Biomedical computation	Center for Clinical Informatics	Mining Massive Data Sets graduate certificate (school of professional development; MS in Biomedical Informatics; MS in statistics; BS,MS, or PhD in Computer Science; BS in Biomedical Computation		social and information network analysis; machine learning; mining massive data set; information retrieval and data search; biomedical informatics; modeling biomedical systems; representations and algorithms for computational molecular biology; translational bioinformatics; biomedical image analysis and representation; machine learning; artificial intelligence; data mining; image analysis; human-computer interaction; systems engineering; scientific and numerical computing; data driven medicine; data mining and analysis; computer			
University of California Berkeley	School of Information	Affiliated with Center for Law and Technology; Center for New Media; Blum Center for Developing Economies; Center for Information Technology Research in the Interest of Society; Townsend Center for the Humanities; Electronic Cultural Atlas Initiative; Information and Communication Technologies and Development; D-Lab (helps Berkeley faculty, staff, and graduate students move forward with world-class research in data intensive social science)	MS in Information Management and Systems; MS in Information and Data Science; PhD in Information Management and Systems	information and computer science design; social sciences, management human-computer interaction; information economics and policy; information law and policy; information organization and retrieval; information systems design; social aspects of information; information and communication technologies and development	history of information; social and organizational issues of information; information law and policy; needs and usability assessment; managing in information-intensive companies; information technology economics, strategy, and policy; cyberlaw; information visualization and presentation; technologies for creativity and learning; information systems and health care; designing mobile experiences; data mining and analytics in intelligent business services; alternative visions of technology; health care and strategy; media, new and otherwise; working with open data; information access; data science and analytics: thought leaders; web architecture and information management; technology and poverty; information organization and retrieval; privacy, security, and cryptography; user interface design and development; database management; quantitative research methods for information systems and management; finding health in the US; health care and the information economy; social data revolution	On-line MS in Information and Data Science to enroll first class of 30 students January 2014; Currently more than 100 students enrolled in MS in Information Management and Systems; 20-25 in PhD program	Some courses are seminar series courses	

University of California Los Angeles	Information and Computer Sciences; Information Studies	Host "DataFest" (Big Data competition for undergraduates); Clinical and translational science institute	BS or minor in Informatics; BS in Business Information Management; BS in Information and Computer Science; Minor in Statistics; MS in Library and Information Studies (specialization in	data mining	bioinformatics; network fundamentals; artificial intelligence; computational and systems biology; pattern recognition and machine learning; data and decisions; data mining; database theory; database management systems; financial data mining; information studies; information structures; information retrieval; information architecture; information systems		
University of California San Diego	UCSD School of Medicine (Public Health); School of Management	San Diego Supercomputer Center, Health Services Research Center, Center for Large-scale Data Systems Research,	Data Mining Certificate (online); Biostatistics certificate(online); MBA training (no specific certificate); BS in Computer Science (specialization in bioinformatics); PhD	system architectures and software; analytics; performance; data growth and use of data; data	data mining; data preparation for data mining; hadoop essentials; R programming; predictive analytics; DAD programming; data mining for scientific applications; biostatistics; competitive advantage through cloud computing; business aspects of cloud computing; technical aspects of cloud computing; advanced data structures; database system principles; database system		seminar series
University of Chicago	School of Business; Computer Science	Host "Data Science for Social Good Summer Fellowship Data Slam" (competition for undergrads and grads); Computation Institute; Conte Center for Computational Neuropsychiatric	MBA Analytical Management concentration; BS, MS, or PhD in Computer Science		managerial decision modeling; data mining; strategic business investments; data driven marketing; database systems; scientific visualization; artificial intelligence; computational linguistics; machine learning and large scale data analysis; computer vision; machine learning; computational biology; database systems; networks and distributed systems; digital biology		
University of Illinois Urbana-Champaign	Computer Science	Multimodal Information Access & Synthesis Center (within Computer Science Department); CyberGIS Center	Data Sciences Summer Institute; BS in Computer Science; MS in Computer Science; MS in Bioinformatics; PhD in Computer Science		structured prediction; text information systems; linguistic structure; computational linguistics; natural language processing; linguistic analysis; speech and language processing; information storage and retrieval; mathematical models of language; information theory;		seminar series Alcatel-Lucent Bell Labs; AT&T labs; Geosemble Technologies
University of Rochester	Computer Science; School of Medicine and Dentistry; Business School	Institute of Data Science (\$100M Commitment); Health Science Center for Computational Innovation; Center for Integrated Research Computing;	BA, BS, MS, PhD in Computer Science; MS in with focus on Data Mining; MS in Business with a focus on Business Analytics (partnership with Engineering and Applied Science); MS in	predictive health analysis; cognitive systems and artificial intelligence; analytics on demand	data structures; science of data structures; explorations in robotics; machines and consciousness; computational models of music; human computer interaction; artificial intelligence; natural language processing; statistical speech and language processing; cryptography; optimization and machine learning; cognitive science; digital media; machine		annual Big Data Forum, Data Analytics symposium, IBM; Xerox
University of Washington	Statistics; Biostatistics; Applied mathematics	eScience Institute; IGERT Program	Certificate in Data Science (continuing education); Certificate in Cloud Data Management and Analytics (continuing education); Certificate in Business Intelligence: Techniques for Decision Making (continuing education); MOOC in Data Science; PhD in Computer science with specialization in Big Data (new September 2013); BS or MS in Computer Science; plan to have an MS in eScience (data science); Certificate in Statistical Analysis with R programming; PhD in Statistics with specialization in Big data		data science; data analysis; deriving knowledge from data at scale; information technology; data programming; data abstractions; data management; data structure and algorithms; computational biology; database systems internals; machine learning; distributed systems; computer vision; very large scale integration; computational linguistics; artificial intelligence; synthetic biology; data compression; data mining; database management; machine learning; machine learning for big data; probabilistic and statistical databases; data visualization; scalable analytics in the cloud; cloud computing; numerical methods for astrophysics		
University of Wisconsin-Madison	Statistics; Biostatistics; Biometry; Computer Science	Data and Information Services Center; Data Mining Institute (Computer Science); Space Science and Engineering Center	MS or PhD in Biostatistics; MS in Biometry; BS, MS or PhD in Statistics; Bioinformatics Certificate		regression analysis; statistics; data analysis; multivariate analysis; statistical data processing; biostatistics; statistical methods for bioscience; epidemiology; statistical computing; data structures; cryptography; computational statistics; combinatorics; pattern recognition; image processing; artificial neural networks and fuzzy systems; artificial intelligence; natural		Microsoft
Vanderbilt University	Scientific Computing; Astronomy; Biology; Economics; Mathematics; Psychology; School of Medicine	Initiative in Data-Intensive Astrophysics; Center for Quantitative Sciences; Informatics Center	Minor in Scientific Computing (undergraduate); PhD Astronomy; BS, MS or PhD in Computer Science; BS in Computer Science with Financial Engineering focus; MS or PhD in Biomedical Informatics; BS, MS, or PhD in Electrical		program design and data structures; high performance scientific computing; stellar astrophysics; galactic astrophysics; computational genomics; genome science; model living systems for biomedical engineering; molecular modeling methods; econometrics; mathematical modeling in economics; scientific computing for psychological and brain science; biomedical informatics; clinical information systems and databases; systems		
Washington University in St. Louis	Biomedical Engineering; Computer Science and Engineering	Center for Biomedical Informatics; Neuroimaging Informatics and Analysis Center	BS in Biomedical Engineering; Minor in Bioinformatics; MS and PhD in Human and Statistical Genetics; BS, MS, and PhD in		biomedical Informatics; computational statistical genetics; bioinformatics; computational molecular biology; data mining and applications to molecular biology; genomics; statistics; population genetics; algorithms and data structures; social network analysis; artificial		seminar series



## Case Western Reserve University / Business-Higher Education Forum

Data Science Industry Roundtable – Monday, November 4, 2013

### Breakout Session Roundup - Overview

#### Shared Current Hire Characteristics:

- Companies are hiring *both* recent and mid-career graduates from a range of data science-related fields, including: engineering, statistics, software development, business analytics, etc..
- Appreciation for seasoned employees who have experience with current and legacy computer systems and tools.
- Strong desire to have new hires with real-world experience.

#### Shared Skill Gap Assessments:

- Need for better communication skills (speaking, writing, presenting, and convincing).
- Need for more hands-on experience before day one.
- Need for increased understanding of the “business case” behind data science applications – including finance and economics.

#### Shared Suggestions:

- New hires should be able to think critically and communicate well: ask questions, explore data, defend positions, work in a team and accept new direction.
- Data scientists don’t need to be subject matter experts, but they need to know *some* and learn *more* specific to industry sector.
- Pair undergrads with more experienced employees.
- Offer/create more internships, co-ops, real world experiences.

## Case Western Reserve University / Business-Higher Education Forum

### Data Science Industry Roundtable – Monday, November 4, 2013

#### Breakout Session Roundup – 1

#### ● **Services:**

The Services group outlined key skills a data science enabled employee would possess:

##### Characteristics of Current Hires:

- Mathematicians
- Statisticians
- Engineers

##### Existing Skills Gap not being addressed:

- Data Science focus with business/discipline minor
- Required understanding the full data lifecycle
- Need 21st century competencies
- Ability to deal with unstructured environments and problems
- Awareness of computing infrastructure
  - current and legacy systems
- Have managerial courage in reporting

- Provide exposure to behavioral sciences
- Offer breadth of real-world experiences
- Encourage understanding of data through industry-specific lens
- Develop both types of people: right and left brain
  - Those who can ask the questions
  - Those who can crunch data

##### Suggestions

- Develop skills beyond only coding
- Encourage structured thought processes
- Train in analytical thinking

## Case Western Reserve University / Business-Higher Education Forum

Data Science Industry Roundtable – Monday, November 4, 2013

### Breakout Session Roundup – 2

#### ● Health Care:

The Health Care group focused on characteristics of current hires, unaddressed workforce needs, and suggestions for future workforce development strategies.

#### Characteristics of current hires:

- Graduates of Tier I R&D Universities
- Enabled w/ Data Science Skills
  - Hacking/programming/Big Data experience
  - Visualization (undergrad)
- Hired from other companies (looking for well-rounded/domain expertise)
- Often, seasoned employees
  - Good w/ tools already used in industry
  - Project management experience

#### Existing Skills Gap Not Being Addressed:

- Need soft skills – Communication
- Need the ability to talk about data-enabled decision-making process
- Need for better presentation skills

- Need “enabled” graduates w/ experience using data tools, not just project management experience

#### Suggestions:

- Pair undergrads with more experience workforce
- Need an increase in work experience (co-ops, internships)
- Need to focus on real-world applications: Is there a new way to adapt the curriculum to address real-world needs?
- Focus on team-based learning
- Increase industry collaboration and academic partnerships
- Remember: Data scientists don’t need to be SME’s, but they need to know a little and need to be able to learn/acquire more

## Case Western Reserve University / Business-Higher Education Forum

Data Science Industry Roundtable – Monday, November 4, 2013

### Breakout Session Roundup – 3

#### ● Energy/Manufacturing

The Energy/Manufacturing group focused on characteristics of current hires, the existing skill gap, and the ideal future candidate.

##### Characteristics of current hires:

- Both mid-career and recent graduates from grad and undergrad (MS/BS) programs
- Background in engineering
  - Computer Science, IT, EE, Power Engineers, Software Engineers
- Background in business/finance

##### Existing Skills Gap Not Being Addressed:

- Lack understanding of Business Case
- Often lack domain expertise – consumer behavior, integrated operations, business processes
- Need more hands-on application experience
- Increase communication skills – listen, talk, write

##### Suggestions:

- Create both “expert” and “enabled”
- Build understanding of business side - Economics/Finance
- Need “core” skill set
  - Information security
  - Ethics
  - Broad tool kit
  - Advanced statistics
  - Basing engineering knowledge
  - Communication skills





## Project Statement:

### New Undergraduate Degree Program in Data Science

*"Leaders in business, education and government must take action to foster a new generation of talent with the technical expertise and unique ideas to make the most of this tsunami of Big Data."*

*~Richard Rodts, Manager of Global Academic Programs, IBM*

The volume of data acquired or generated by corporations continues to increase at unprecedented rates. The need to efficiently interpret data into information useful for strategic decisions is paramount. For example, information within these large data sets can lead to better assessment of customers' needs, business decisions could be made with more confidence, and opportunities for greater operational efficiencies, cost reductions and reduced risk could be identified. All of these aspects have become increasingly important in today's global business community. The potential impact of data analytics on the way industry does business is akin to the way the internet has shifted paradigms for commerce.

While the development of analytics skills for today's professionals has become a necessity, there exists a tremendous gap in the growing number of jobs that require data-driven skills, and the available pool of job candidates who can fulfil these roles. In fact, according to a recent IBM *Tech Trends Survey*, "only one in ten businesses have the required skills to use state-of-the-art technology in the field of Big Data and analytics."

#### **The Program**

**Case Western Reserve is launching a distinctive undergraduate degree program in data science in the fall of 2014.**

Rooted in a core curriculum of data-science fundamentals, our program will prepare graduates to meet industry needs through cutting-edge instruction, exciting areas of concentration and an extensive capstone experience.

Students pursuing this curriculum will receive a strong foundation in topics fundamental to data science (such as mathematics, statistics, and computing algorithms), breadth in allied technical areas (such as biology, physics, or engineering), and a focus on a specific domain area: health, energy, and manufacturing and production. As the program matures, other concentrations such as finance may be added.

All of our data science programs will include a strong experiential learning component. A minimum of two internships in data science (one in the summer between sophomore and junior year, the second in the summer between junior and senior year) or one seven-month, full-time co-op assignment will be expected. In addition, all students must complete a two-semester senior capstone project in data science.

Students completing our data science programs will be well prepared to fill entry-level workforce needs for data scientists in a variety of industries. We also expect to launch a post-baccalaureate certificate program for industry personnel interested in retraining.

## **Corporate partners**

Case Western Reserve is forming partnerships with businesses to:

- Help build curriculum in data science and analytics
- Provide new infrastructure to support a pipeline of students – both undergraduates and post graduate employees – studying in this critical area.
- Provide students with critical scholarship funding
- Provide students with an internship or co-op with a premiere industry partner

## **The Need**

Numerous studies underscore the need for workers capable of using the methodologies of data science.

- McKinsey Global Institute predicts a **nationwide shortage of 140,000 to 190,000 workers** with “deep analytical skills,” and a **deficit of 1.5 million managers** capable of using big data analytics for actionable insights in their decision-making.
- McKinsey predicts a **40 percent annual growth in global data** and **\$300 billion in potential value-add** of data analytics to the nation’s health care industry alone.
- Gartner Inc. indicates that by 2015, **4.4 million information technology jobs** globally will be created to support data science and analytics, generating **1.9 million IT jobs** in the United States.
- The U.S. government anticipates a **shortage of about 50,000 qualified workers** in health IT.

## **About Case Western Reserve**

Case Western Reserve University is one of the country’s leading private research institutions. Located in Cleveland, the university offers a unique combination of forward-thinking educational opportunities in an inspiring cultural setting. The renowned faculty engages in teaching and research in a collaborative, hands-on environment. Case Western’s nationally recognized programs include arts and sciences, dental medicine, engineering, law, management, medicine, nursing and social work. About 4,200 undergraduate and 5,600 graduate students comprise the student body.

BHEF WINTER 2014 MEETING

# DATA SCIENCE OVERVIEW



## Introduction

BHEF’s National Higher Education and Workforce Initiative has served as a powerful platform for launching innovation in regional workforce projects through strategic collaboration between business and higher education. The success of the Initiative since its launch provides a foundation for expanding its focus into an additional emerging field: data science. During BHEF’s winter meeting, Case Western Reserve University (CWRU), in collaboration with corporate partners, will announce the launch of a distinctive undergraduate degree program in data science.

The following describes the emergence of data science as an essential tool for decision making and innovation in a wide range of organizations, outlines the demand for data science experts and data analytics-enabled graduates, reports on analysis of existing data science programs at sampled colleges and universities, and highlights work underway on BHEF academic members’ campuses to meet the growing workforce needs of business, government, scientific and research organizations, and cultural institutions.

## Emerging Workforce Needs in Data Science

The application of data science is pervasive in both the public and private sectors. Companies of all sizes rely on data science and analytics as key transformational components to their core operations. A 2011 report by the McKinsey Global Institute, *Big Data: The Next Frontier for Innovation, Competition, and Productivity*, noted that “big data” is growing at a rate of 40 percent each year and has the potential to add \$300 billion of value to the nation’s health care industry alone, with broad application in virtually every sector, as well as scientific organizations and cultural institutions. Projections by Gartner, Inc., indicate that in less than 12 months, 4.4 million information technology (IT) jobs to support big data will be created globally. About 1.9 million of those jobs will be within the United States, and big data has the potential to create three times that number of jobs outside of IT. Despite this demand, the U.S. faces a significant shortfall in the number of data scientists and “data-enabled” professionals. According to the McKinsey report, the United States will need an additional 140,000 to 190,000 data science experts with “deep analytical skills,” plus 1.5 million managers capable of using data analytics in decision making.

Data science provides new sources of actionable insights that will improve decision making and stoke innovation. While business is able to collect and store vast amounts of data, most struggle to harness these data for decision making. Data becomes business intelligence—and valuable to decision makers—when data science experts have domain-specific expertise to access, unlock, and interpret the data available to them.

Data analytics-enabled individuals—those who understand the processes and tools of data science—with domain-specific expertise can turn data into information, and they are critical to the ability of businesses to implement data-driven decision-making throughout organizations. While there is considerable need nationally for data scientists, there is an even greater workforce need for the analytics-enabled professional who can marry a deep background in a particular field (e.g., engineering, economics, or business) with a strong understanding of the application of analytics and visualization tools.

In addition, the data science “footprint” has expanded from core IT/computer science functions to each business unit and the many functions within these units, including operations, marketing, and communications. Businesses that are able to successfully integrate data analytics-enabled professionals into these functions have gained significant competitive advantages. Yet, this expansion in demand results in a talent gap in data analytics skills in the current and future workforce.

## The Challenge

While higher education is responding to the demand from businesses for more data science professionals, this demand quickly outstrips the supply. Today, most higher education data science programs are located within the school of engineering and/or the department of computer science. These programs serve as post-baccalaureate training for individuals who already have a strong grasp of analytical thinking, applied mathematics, and competency in computer programming, largely limiting access to graduates from other STEM fields. Consequently, these graduate programs prepare data science experts who will lack the domain-specific knowledge in health, transportation, economics, business, and public policy that companies need.

To date, very few programs have been developed to offer undergraduates training in data science. Even at higher education institutions with numerous course offerings in data science, undergraduates have limited access to these courses before the final two years of college, and these students will largely be STEM majors. But as a result of high attrition among STEM undergraduates in the first two years, few STEM graduates will actually be exposed to data science. Even fewer non-STEM majors will be exposed to data analytics because data science and analytics courses are not integrated into most undergraduate programs.

To ensure a robust and diverse data science and analytics-enabled workforce, learning opportunities in data science must be integrated into courses across the undergraduate curricula, beginning in the first year.

## Strategic Business Engagement Offers a Solution to Undergraduate Pathways in Data Science

Together, business and higher education can address our nation's potential data science workforce deficit. Through deep collaboration with businesses in a variety of industry sectors, higher education can respond to clearly articulated corporate needs, creating curricula and learning opportunities that will build robust undergraduate pathways and produce both data science experts and analytics-enabled graduates across all sectors. Furthermore, collaborations in data science between business and higher education have the potential to create new majors as well as integrate learning opportunities in data science and analytics into the broader higher education curriculum (e.g., the social sciences and humanities) through minors and certificates. Such strategic partnerships could result in a significantly more diverse talent pool entering the data science and analytics-enabled workforce.

BHEF's Initiative provides a platform to develop strategic partnerships and form a network of regional projects led by business and academic members which will create new undergraduate pathways in data science and analytics. BHEF's winter meeting represents a unique opportunity to launch BHEF's inaugural project in data science. To address this need for undergraduates to be prepared with data science skills and knowledge, CWRU will launch a distinctive undergraduate degree program in data science in the fall of 2014. Based on a core curriculum of data-science fundamentals, the CWRU program will prepare graduates to meet business needs through cutting-edge instruction; exciting areas of concentration in health, energy, and manufacturing and production; and an extensive capstone experience. Students completing the data science programs will be well prepared to fill entry-level workforce needs for data scientists in a variety of industries. CWRU will continue its focus on data science in the future through the development of a post-baccalaureate certificate program for business personnel interested in retraining.

Business is partnering with universities to develop opportunities for students to obtain data science skills. The Humana Foundation provided Bellarmine University in Louisville, Kentucky, a multi-year, \$1 million grant to support a new program, the Institute for Advanced Analytics. Opening next fall, the institute will offer new informatics and technology degrees at the undergraduate, graduate, and continuing education levels and will develop interdisciplinary data analysis programs in nursing and health sciences, communication, education, business, and environmental studies.

In addition, strategic engagement between business and higher education can support the development of freshman introductory courses to expose students to data science and analytics. Introductory courses could include information that would explain to students how data science may impact their majors and courses of study. Equipped at the very beginning of their undergraduate experience with this knowledge and with business support—to include mentors, internships, and other resources—these students may persist and thus significantly boost the data science pipeline.

Current introductory course redesign efforts across the country can serve as examples for new approaches to expose students from many disciplines to data science and analytics. CWRU's freshman coursework in engineering and materials science, developed as one of BHEF's first regional

projects, is one successful example. Through a series of courses, CWRU first-year students interested in these fields are directly exposed to processes and projects at a diverse array of local medical, aerospace, electric, and advanced-materials technology businesses. Internships and other on-site opportunities supplement project-based teamwork on real-world problems, with students ultimately producing real parts, components, or devices. From the onset of their undergraduate studies, materials science and engineering students are engaged with real-world examples in their chosen field.

For example, as part of the Association of American Universities (AAU) STEM education initiative, the University of Arizona is redesigning introductory STEM courses to improve information and quantitative literacy by incorporating the use of real-life applications in problem-solving. It is also expanding its use of hands-on demonstrations and experiments in introductory courses to further develop conceptual understandings of central theories in biology and engineering. As part of that same AAU initiative, the University of Pennsylvania seeks to improve STEM education for its students by creating blended introductory courses in math, chemistry, physics, and engineering. These are two of several evidence-based approaches that integrate data science into introductory undergraduate courses.

This type of strategic engagement between business and higher education is an excellent strategy to apply to data science, which requires the application of theoretical knowledge to real-world problems for truly relevant learning opportunities for both data science experts and analytics-enabled graduates.

### **Next Steps: Building the Foundation for a National Data Science Network**

Working at the nexus of business and higher education, BHEF is taking a lead role in mapping and executing a robust strategy to help the nation meet its needs for a skilled data science workforce. Intentionally moving beyond engagements that are merely transactional, BHEF plans to engage companies, higher education institutions, government agencies, philanthropies, cultural institutions, and other key stakeholders in coordinated, long-term, action-oriented partnerships. In data science, a discipline that did not exist even a decade ago, BHEF will play a pivotal role in the definition, design, and delivery of powerful new pathways for preparing and educating the data science workforce, including both professionals and enabled employees, particularly at the undergraduate level.

Based on the successful example of the National Cybersecurity Network, launched in 2012 at the Alfred P. Sloan Foundation, BHEF continues to convene top leaders from business, higher education, and state and federal government agencies, with the most recent meeting being held in November 2013 at the IBM-Almaden Research Center in San José, California. The BHEF National Data Science Network will be a forum through which business, higher education, and government share ideas, collaborate to strengthen and diversify the data science workforce, and align undergraduate education in data science with regional workforce requirements. This can be achieved by focusing on the earliest years of the undergraduate experience and increasing the persistence of students to degree completion in this high-demand field.

## Data Science for Corporate Decision-Making: Preparing Undergraduates to Unleash the Power of Data

The volume of data acquired or generated by corporations continues to increase at unprecedented rates, and businesses increasingly are working to interpret this data for strategic decision-making. What can data reveal about customer preferences? Production flow? Opportunities for cost savings? The potential impact of data analytics on the way industry does business is akin to the way the internet has shifted paradigms for commerce.

Case Western Reserve University (CWRU) is launching a distinctive undergraduate degree program to fill this workforce need.

Rooted in a core curriculum of data-science fundamentals, the program will prepare graduates to meet industry needs through cutting-edge instruction, exciting areas of concentration, and an extensive capstone experience. Students will receive a strong foundation in topics fundamental to data science (such as mathematics, statistics, and computing algorithms), breadth in allied technical areas (such as biology, physics, or engineering), and a focus on a specific domain area: health, energy, and manufacturing and production. As the program matures, other concentrations such as finance may be added.

All of the data science programs will include a strong experiential learning component. Students are also expected to complete a minimum of two internships in data science (one in the summer between sophomore and junior year, the second in the summer between junior and senior year) or one seven-month, full-time, co-op assignment. In addition, all students must complete a two-semester senior capstone project in data science.

Students completing the data science programs will be well prepared to fill entry-level workforce needs for data scientists in a variety of industries. CWRU also will launch a post-baccalaureate certificate program for industry personnel interested in retraining.

These new programs grew from a data science industry roundtable hosted by CWRU last fall. Business leaders discussed their workforce needs in data science skills, their eagerness to hire both recent and mid-career graduates, and the importance for these graduates to come with real-world experience. CWRU's new data science program will reflect their feedback and thrive with their engagement and support.

Field	Data Science Application	Resulting Outcome
Agronomy	Sensors were added to John Deere equipment to help farmers manage their fleets' usage. The information is combined with historical and real-time data regarding weather prediction, soil conditions, and crop features.	Farmers maximized return on crops by implementing recommended crop selection, location, and timing, as well as plowing technique, methodology, and location. <sup>1</sup>
Archeology	A team of doctors and archeologists analyzed data from whole-body CT scans of 137 mummies spanning 4,000 years.	The team demonstrated that humans have been affected by atherosclerosis since preindustrial times, proving it is not a modern-day disease. <sup>2</sup>
Astronomy	Four years of data from NASA's orbiting Kepler telescope were analyzed to compute how many planets lie in their solar systems' "Goldilocks zone," where surface temperatures support liquid water.	Astronomers calculated 11 billion potentially habitable planets in our galaxy. One in five sun-like stars harbors a roughly Earth-size planet in the habitable zone, with the nearest possibly close enough for communication. <sup>3</sup>
Biology	ENCyclopedia Of DNA Elements (ENCODE) is an open research consortium aiming to rigorously analyze the human genome sequence and identify all functional elements, complementing the completed Human Genome Project.	ENCODE provides insight into how genetic variations affect human traits and diseases by assigning a function to approximately 80% of the human genome. <sup>4</sup>
Climatology	Weather reports, tidal phases, satellite images, and deforestation maps were analyzed to improve siting of wind turbines by Vestas, a global energy company.	These efforts increased turbine productivity by reducing response time to implement wind forecasting information by 97%. <sup>5</sup>

<sup>1</sup> <http://www.bigdata-startups.com/BigData-startup/john-deere-revolutionizing-farming-big-data/>.

<sup>2</sup> Thompson R.C., Allam A.H., Lombardi G.P., et al. (2013). Atherosclerosis across 4000 years of human history: the Horus study of four ancient populations. *The Lancet* 381: 1211-1222.

<sup>3</sup> Petigura E., Howard A., and Marcy G. (2013). Prevalence of Earth-size planets orbiting Sun-like stars. *Proceedings of the National Academy of Sciences of the United States of America* 110: 19273-19278.

<sup>4</sup> Maher B. (2012). ENCODE: The human encyclopedia. *Nature* 489: 46-48.

<sup>5</sup> "Vestas Wind Systems Turns to IBM Big Data Analytics for Smarter Wind Energy." IBM News Release (October 24, 2011).



Field	Data Science Application	Resulting Outcome
Criminology	Social network analysis was used on a data set of 60 active gangs and 600 factions by the Chicago Police Department to determine social and geographic factors that connect and divide gang members.	Police reduced, by 20%, city-wide homicides by using analysis results to predict future potential victims of gang-related violence and monitoring those areas. <sup>6</sup>
Economics	Housing-related Google search queries were analyzed to determine alternate methods of real-estate forecasting.	Trends of increasing or decreasing volumes of Google queries were more accurate predictors of future house sales than expert forecasts by real estate economists. <sup>7</sup>
Education Policy	Test scores, attendance records, tax returns, and demographic information on 2.5 million New York City schoolchildren were analyzed and correlated with their adult earnings to study the long-term effects of teaching quality, as determined by analysis of administrative performance records.	The study revealed that a student's lifetime earnings increased by one-quarter of a million dollars in present value terms by replacing a poorly rated teacher with an average-rated teacher. <sup>8</sup>
Engineering	<p>During missile production, data such as the number of turns on a screw in assembly operations are continuously collected and evaluated by Raytheon.</p> <p>To determine equipment at risk for failure, predictive analysis is applied to temperature, acoustic, and visual data collected from Union Pacific rail cars, including noises from wheel vibrations and ultrasound wheel visuals.</p>	<p>Error messages report anomalies in missile assembly, halting production and reducing defects in real-time, ultimately reducing production costs.<sup>9</sup></p> <p>Spending reduced by millions as a result of a 75% reduction in bearing-related derailments.<sup>10</sup></p>

<sup>6</sup> Tony Dokoupil. "'Small world of murder': As homicides drop, Chicago police focus on social networks of gangs." *NBC News* (December 17, 2013). <http://usnews.nbcnews.com/news/2013/12/17/21864122-small-world-of-murder-as-homicides-drop-chicago-police-focus-on-social-networks-of-gangs?lite>.

<sup>7</sup> Wu L. and Brynjolfsson E. (2009). The Future of Prediction: How Google Searches Foreshadow Housing Prices and Quantities. *ICIS 2009 Proceedings. Paper 147*.

<sup>8</sup> Chetty R., Friedman J., and Rockoff J. (2011). The Long-Term Impacts of Teachers: Teacher Value-Added and Student Outcomes in Adulthood. NBER Working Paper No. 17699.

<sup>9</sup> Ahmed Noor. "Putting Big Data to Work." <https://www.asme.org/wwwasmeorg/media/ResourceFiles/Network/Media/Mechanical%20Engineering%20Magazine/1013BigData.pdf>.

<sup>10</sup> Chris Murphy. "Union Pacific Delivers Internet of Things to Reality Check." *Information Week*. August 3, 2012. <http://www.informationweek.com/it-leadership/union-pacific-delivers-internet-of-things-reality-check/d/d-id/1105644?>

Field	Data Science Application	Resulting Outcome
Finance	Pioneer West Virginia Credit Union applied data analytics to its loan and deposits portfolios, with a focus on loan delinquencies.	Daily delinquency reports replaced monthly delinquency reports, allowing for early intervention, which decreased the loan delinquency rate by 110 basis points within 5 months. <sup>11</sup>
Literary History	Key words, phrases, and linguistic patterns from 3,592 literary works published from 1780 to 1900 were computationally analyzed.	Analysis revealed Jane Austen and Sir Walter Scott had the greatest influence on authors' writing style and themes. <sup>12</sup>
Literature	A Google database of 15 million scanned books spanning several centuries was analyzed for fluctuations in word choice.	Year-to-year fluctuations in the use of particular words allowed the researchers to examine the evolution of the novel in the United States and changes in American society and values. <sup>13</sup>
Political Science	Barack Obama's 2012 re-election campaign staff built predictive models of voter behavior using demographic information such as age, sex, race, neighborhood, voting records, and consumer data.	Using their analyses, the Obama campaign raised more than \$1 billion by increasing the efficacy of traditional fundraising strategies, such as phone calls, direct mailings, and social media, and increased Obama voter turnout by more efficiently placing TV ads to target swing-state voters. <sup>14</sup>
Psychology	Demographic and linguistic data from Facebook were combined with responses from personality questionnaires by University of Pennsylvania researchers.	Novel insights into the relationship between personal traits and language were recognized, such as a correlation between emotional stability and sports references. <sup>15</sup>

<sup>11</sup> "Pioneer accelerates insight and enhances decision-making." IBM Case Study (June 9, 2011). [http://www-01.ibm.com/software/success/cssdb.nsf/CS/STRD-8HKM2P?OpenDocument&Site=default&cty=en\\_us](http://www-01.ibm.com/software/success/cssdb.nsf/CS/STRD-8HKM2P?OpenDocument&Site=default&cty=en_us).

<sup>12</sup> Matthew L. Jocklers. *Macroanalysis: Digital Methods and Literary History*. University of Illinois Press, 2013.

<sup>13</sup> Marc Egnal. Evolution of the Novel in the United States: The Statistical Evidence. *Social Science History* (2013) 37:2. [http://muse.jhu.edu/login?auth=0&type=summary&url=/journals/social\\_science\\_history/v037/37.2.egnal.html](http://muse.jhu.edu/login?auth=0&type=summary&url=/journals/social_science_history/v037/37.2.egnal.html).

<sup>14</sup> Michael Schere. Inside the Secret World of the Data Crunchers Who Helped Obama Win. *Time* (November 7, 2012).

<sup>15</sup> Penn Researchers Use Facebook Data to Predict Users' Age, Gender and Personality Traits. <http://www.upenn.edu/pennnews/news/penn-researchers-use-facebook-data-predict-users-age-gender-and-personality-traits>.



*Creating Solutions. Inspiring Action.*

## **WINTER MEMBER MEETING**

**February 6 -7, 2014**

**Hotel Monaco Gallup  
Headquarters  
Washington, D.C.**

## **Key Word Glossary: Data Science & Analytics**

Data Sources ↔ Informatics ↔ Analytics ↔ Actionable Intelligence

**Analytics** – the discovery of insights in data

**Data Science** – builds on techniques and theories from many fields, including mathematics, statistics, and computer science related topics such as data engineering, metadata and terminology systems, pattern recognition and machine learning, data mining, advanced algorithms, user interfaces and visualization, privacy and security, uncertainty modeling, data storage and management, and high performance computing with the goal of extracting meaning from data and creating data products.

**Data source** – a collection or a stream of data such as a Twitter feed or weblog

**Exploratory data analysis (EDA)** – finding patterns within data before applying a standard or new analytics tool. It is a means of exploring the data and to find the main characteristics.

**Cloud computing** – a framework such as Hadoop that is built to enable the process and storage of big data across a distributed file system

**Internet of Things** – ordinary devices that are connected to the internet at any time any via sensors

**Open Access Science** – a US OSTP policy to make the published results of federally funded research freely available

**Project Open Data** – A US OSTP initiative. Project Open Data is an online, public repository

**Statistics** – is the study of the collection, organization, analysis, interpretation and presentation of data.

## Full Glossary: Data Science & Analytics

### Data Sources ↔ Informatics ↔ Analytics ↔ Actionable Intelligence

#### A

**Aggregation** – a process of searching, gathering and presenting data

**Algorithms** – a mathematical formula that can perform certain analyses on data

**Analytics** – the discovery of insights in data

**Anomaly detection** – the search for data items in a dataset that do not match a projected pattern or expected behavior.

Anomalies are also called outliers, exceptions, surprises or contaminants and they often provide critical and actionable information.

**Anonymization** – making data anonymous; removing all data points that could lead to identify a person

#### B

**Big Data Scientist** – someone who is able to develop the algorithms to make sense out of big data

**Business Intelligence** – the theories, methodologies and processes to make data understandable

#### C

**Classification analysis** – a systematic process for obtaining important and relevant information about data, also meta data called; data about data.

**Cloud computing** – a distributed computing system over a network used for storing data off-premises

**Clustering analysis** – the process of identifying objects that are similar to each other and cluster them in order to understand the differences as well as the similarities within the data.

**Comparative analysis** – it ensures a step-by-step procedure of comparisons and calculations to detect patterns within very large data sets.

**Complex structured data** – data that are composed of two or more complex, complicated, and interrelated parts that cannot be easily interpreted by structured query languages and tools.

**Correlation analysis** – the analysis of data to determine a relationship between variables and whether that relationship is negative (- 1.00) or positive (+1.00).

#### D

**Data aggregation tools** - the process of transforming scattered data from numerous sources into a single new one.

**Data analyst** – someone analyzing, modeling, cleaning or processing data

**Data Analysis** – Analysis of data is a process of inspecting, cleaning, transforming, and modeling data with the goal of discovering useful information, suggesting conclusions, and supporting decision making.

**Database** – a digital collection of data stored via a certain technique

**Database-as-a-Service** – a database hosted in the cloud on a pay per use basis, for example Amazon Web Services

**Database Management System** – collecting, storing and providing access of data

**Data cleaning** – the process of reviewing and revising data in order to delete duplicates, correct errors and provide consistency

**Data ethical guidelines** – guidelines that help organizations being transparent with their data, ensuring simplicity, security and privacy

**Data source** – a stream of data such as a Twitter feed or RSS

**Data mining** – the process of finding certain patterns or information from data sets

**Data modeling** – the analysis of data objects using data modeling techniques to create insights from the data

**Data set** – a collection of data

**De-identification** – same as anonymization; ensuring a person cannot be identified through the data

#### E

**Exploratory data analysis (EDA)** – finding patterns within data without standard procedures or methods. It is a means of discovering the data and to find the data sets main characteristics.

**Extract, Transform and Load (ETL)** – a process in a database and data warehousing meaning extracting the data from various sources, transforming it to fit operational needs and loading it into the database

## G

**Gamification** – using game elements in a non-game context; very useful to create data therefore coined as the friendly scout of big data

**Graph Analysis** – viewing relationships among the nodes in terms of the network or graph theory, meaning analyzing connections between nodes in a network and the strength of the ties.

**Graph Databases** – they use graph structures (a finite set of ordered pairs or certain entities), with edges, properties and nodes for data storage. It provides index-free adjacency, meaning that every element is directly linked to its neighbor element.

## H

**Hadoop** – an open-source framework that is built to enable the process and storage of big data across a distributed file system

**HBase** – an open source, non-relational, distributed database running in conjunction with Hadoop

**HDFS** – Hadoop Distributed File System; a distributed file system designed to run on commodity hardware

**High-Performance-Computing (HPC)** – using supercomputers to solve highly complex and advanced computing problems

## I

**Internet of Things** – ordinary devices that are connected to the internet at any time any via sensors

## J

**Juridical data compliance** – relevant when you use cloud solutions and where the data is stored in a different country or continent. Be aware that data stored in a different country has to oblige to the law in that country.

## K

**KeyValue Databases** – they store data with a primary key, a uniquely identifiable record, which makes easy and fast to look up. The data stored in a KeyValue is normally some kind of primitive of the programming language.

## L

**Linked Data** – Linked Data describes a method of publishing structured data so that it can be interlinked and become more useful. It builds upon standard Web technologies such as HTTP, RDF and URIs

**Load balancing** – distributing workload across multiple computers or servers in order to achieve optimal results and utilization of the system

**Location data** – GPS data describing a geographical location

## M

**Machine data** – data created by machines via sensors or algorithms

**Machine learning** – part of artificial intelligence where machines learn from what they are doing and become better over time

**MapReduce** – a software framework for processing vast amounts of data

**Massive Data Analysis** – A 2013 National Research Council report on how data mining of massive data sets is transformative. Massive datasets are potential sources of discovery and knowledge, requiring sophisticated analysis techniques aiming to find relational and semantic interpretations of the phenomena underlying the data.

[http://www.nap.edu/catalog.php?record\\_id=18374](http://www.nap.edu/catalog.php?record_id=18374)

**Massively Parallel Processing (MPP)** – using many different processors (or computers) to perform certain computational tasks at the same time

**Metadata** – data about data; gives information about what the data is about.

**MongoDB** – an open-source NoSQL database

**Multi-Dimensional Databases** – a database optimized for data online analytical processing (OLAP) applications and for data warehousing.

**MultiValue Databases** – they are a type of NoSQL and multidimensional databases that understand 3 dimensional data directly. They are primarily giant strings that are perfect for manipulating HTML and XML strings directly

## N

**Natural Language Processing** – a field of computer science involved with interactions between computers and human languages

**Network analysis** – viewing relationships among the nodes in terms of the network or graph theory, meaning analyzing connections between nodes in a network and the strength of the ties.

**NewSQL** – an elegant, well-defined database system that is easier to learn and better than SQL. It is even newer than NoSQL

**NoSQL** – sometimes referred to as 'Not only SQL' as it is a database that doesn't adhere to traditional relational database structures. It is more consistent and can achieve higher availability and horizontal scaling.

## O

**Object Databases** – they store data in the form of objects, as used by object-oriented programming. They are different from relational or graph databases and most of them offer a query language that allows object to be found with a declarative programming approach.

**Object-based Image Analysis** – analyzing digital images can be performed with data from individual pixels, whereas object-based image analysis uses data from a selection of related pixels, called objects or image objects.

**Open Access Science** – a US OSTP policy to make the published results of federally funded research freely available to the public within one year of publication and requiring researchers to better account for and manage the digital data resulting from federally funded scientific research. <http://www.whitehouse.gov/blog/2013/02/22/expanding-public-access-results-federally-funded-research>

**Open Data Charter** – a policy of the G8 nations, signed in 2013. The Open Data Charter sets out 5 strategic principles including an expectation that all government data will be published openly by default, alongside principles to increase the quality, quantity and re-use of the data that is released. G8 members have also identified 14 high-value areas – from education to transport, and from health to crime and justice – from which they will release data.

<https://www.gov.uk/government/publications/open-data-charter>

**Open Data Policy** – US OSTP Policy on Open Data

<http://www.whitehouse.gov/sites/default/files/omb/memoranda/2013/m-13-13.pdf>

**Openness** – the rise of the Internet and the digitization of information are increasing the "openness" of information, processes, and institutions. <http://www.ced.org/reports/single/harnessing-openness-to-improve-research-teaching-and-learning-in-higher-edu>

**Open Source** – a development model to promote universal access via free license to a product's design or blueprint, and universal redistribution of that design or blueprint, including subsequent improvements to it by anyone.

**Open Source Software** – computer software with its source code made available and licensed with a license in which the copyright holder provides the rights to study, change and distribute the software to anyone and for any purpose

**Optimization analysis** - the process of optimization during the design cycle of products done by algorithms. It allows companies to virtually design many different variations of a product and to test that product against pre-set variables.

**Ontology** – ontology represents knowledge as a set of concepts within a domain and the relationships between those concepts

**Outlier detection** – an outlier is an object that deviates significantly from the general average within a dataset or a combination of data. It is numerically distant from the rest of the data and therefore, the outlier indicates that something is going on and generally therefore requires additional analysis.

## P

**Pattern Recognition** – identifying patterns in data via algorithms to make predictions of new data coming from the same source.

**Predictive analysis/analytics** – the most valuable analysis/analytics within big data as they help predict what someone is likely to buy, visit, do or how someone will behave in the (near) future. It uses a variety of different data sets such as historical, transactional, social or customer profile data to identify risks and opportunities.

**Privacy** – to seclude certain data / information about oneself that is deemed personal

**Project Open Data** – A US OSTP initiative. Project Open Data is an online, public repository intended to foster collaboration and promote the continual improvement of the Open Data Policy.

<http://www.whitehouse.gov/blog/2013/05/16/introducing-project-open-data> Project Open Data is hosted on GitHub

<http://project-open-data.github.io/>

**Public data** – public information or data sets that were created with public funding

## Q

**Query** – asking for information to answer a certain question

## R

**Real-time data** – data that is created, processed, stored, analyzed and visualized within milliseconds

**Recommendation engine** – an algorithm that suggests certain products based on previous buying behavior or buying behavior of others

**Re-identification** – combining several data sets to find a certain person within anonymized data

**Regression analysis** – to define the dependency between variables. It assumes a one-way causal effect from one variable to the response of another variable.

**RFID** – Radio Frequency Identification; a type of sensor using wireless non-contact radio-frequency electromagnetic fields to transfer data

**Reproducible Science** – An effort of the US NSF to advance the idea that the ultimate product of academic research is the paper along with the full computational environment used to produce the results in the paper such as the code, data, etc. that can be used to reproduce the results and create new work based on the research.

[http://www.reproduciblescience.org/index.php/Main\\_Page](http://www.reproduciblescience.org/index.php/Main_Page)

**Resource Description Framework (RDF)** – a metadata data model which is part of the semantic web effort. In the form of subject-predicate-object expressions. These expressions are known as triples in RDF terminology

## S

**Semantic Web** – a project of W3C, which "provides a common framework that allows data to be shared and reused across application, enterprise, and community boundaries

**Semi-structured data** - a form of structured data that does not have a formal structure like structured data. It does however have tags or other markers to enforce hierarchy of records.

**Signal analysis** – it refers to the analysis of measurement of time varying or spatially varying physical quantities to analyze the performance of a product. Especially used with sensor data.

**Simulation analysis** – a simulation is the imitation of the operation of a real-world process or system. A simulation analysis helps to ensure optimal product performance taking into account many different variables.

**Smart grid** – refers to using sensors within an energy grid to monitor what is going on in real-time helping to increase efficiency

**Software-as-a-Service** – a software tool that is used of the web via a browser

**Spatial analysis** – refers to analyzing spatial data such as geographic data or topological data to identify and understand patterns and regularities within data distributed in geographic space.

**Statistics** – is the study of the collection, organization, analysis, interpretation and presentation of data. It deals with all aspects of data, including the planning of data collection in terms of the design of surveys and experiments.

**SQL** – a programming language for retrieving data from a relational database

**Structured data** – data that is identifiable as it is organized in structure like rows and columns. The data resides in fixed fields within a record or file or the data is tagged correctly and can be accurately identified.

## T

**Time series analysis** - analyzing well-defined data obtained through repeated measurements of time. The data has to be well defined and measured at successive points in time spaced at identical time intervals.

**Topological Data Analysis** – focusing on the shape of complex data and identifying clusters and any statistical significance that is present within that data.

**Transactional data** – dynamic data that changes over time

**Transparency** – consumers want to know what happens with their data and organizations have to be transparent about that

## U

**Un-structured data** - unstructured data is regarded as data that is in general text heavy, but may also contain dates, numbers and facts.

## V



**Value** – all that available data will create a lot of value for organizations, societies and consumers. Big data means big business and every industry will reap the benefits from big data.

**Variability** – it means that the meaning of the data can change (rapidly). In (almost) the same tweets for example a word can have a totally different meaning

**Variety** – data today comes in many different formats: structured data, semi-structured data, unstructured data and even complex structured data

**Velocity** – the speed at which the data is created, stored, analyzed and visualized

**Veracity** – organizations need to ensure that the data is correct as well as the analyses performed on the data are correct. Veracity refers to the correctness of the data

**Visualization** – with the right visualizations, raw data can be put to use. Visualizations of course do not mean ordinary graphs or pie-charts. They mean complex graphs that can include many variables of data while still remaining understandable and readable

**Volume** – the amount of data, ranging from megabytes to brontobytes

## W

**Weather data** – an important open public data source that can provide organizations with a lot of insights if combined with other sources

## X

**XML** – Extensible Markup Language (XML) is a markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable.

Glossary information from <http://www.bigdata-startups.com/abc-big-data-glossary-terminology/>, Wikipedia, US OSTP, G8 - gov.uk

Course Syllabus<sup>a</sup>

Instructor: Mehmet Koyutürk

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<sup>a</sup>Everything in this syllabus is subject to change based on students' suggestions and instructor's improvements.

## Course Objectives

In recent years, there has been an explosion in generation of biological data that provide genome-scale information on cellular processes. These data include genomic sequences, gene expression, protein expression, protein-protein interactions, protein-DNA interactions, metabolite concentrations, and metabolic fluxes, among others. Such data are often analyzed within the framework of biological network models, which provide a large-scale view of the functional relationships among multiple molecules in the cell.

This course provides a detailed review of computational approaches that are developed to analyze these novel sources of biological data. Topics include prediction of protein-protein interactions, genetic regulatory network inference, analysis of network topology, network motifs, network alignment, network-based functional annotation, gene set enrichment analysis, metabolic flux analysis and network-based analysis of genomic, functional genomic, and proteomic data with applications to the systems biology of complex diseases. It is expected that, upon completion of this course, the students will achieve the following objectives:

- Become familiar with existing tools and resources for computational analysis of “omic” datasets.
- Develop an awareness of the computational problems that arise in the modeling and analysis of cellular systems.
- Understand fundamental abstractions and computational approaches used to formulate and address these problems.
- Be able to use, manipulate, and extend existing computational infrastructure for analyzing systems biology data.

## Class Meeting

MW 1:45-3:00 PM, Sears 354.

## Instructor

- Mehmet Koyutürk  
**Office:** Olin 512  
**Phone:** 368-2963  
**e-mail:** mxk331@case.edu  
**Office hours:** MW 11:00 AM - 12: 00PM and by appointment.

## Course Work & Grading

**Assignments:** (30%) There are three practical assignments. In each assignment, one or more datasets will be provided, and the students will be asked to analyze the data to answer specific questions, possibly using publicly available computational resources and public data.

**Paper Discussion:** (Leading 20%, Contribution 10%) We will discuss several research papers on topics that are covered in the class. In each discussion session, we will discuss one paper. Each Monday, one student will present a recent research paper and lead the discussion on this paper. Each student in the class will review one of the papers and submit their review of the research papers to the corresponding presenter by 5 PM on Friday. During the class, the presenters will summarize the paper (key ideas, main contributions, experimental results, conclusions) and provide a discussion of the reviews submitted by all students. Based on this content, the presenters will arbitrate a discussion on the intellectual merit and potential impact of these papers, their limitations, and ideas for building on their results.

**Project:** (15% Proposal, 25% Final Presentation and Report) The students will develop and conduct research projects that make use of omic data. The projects will be conducted in teams of two and **the teams are required to be interdisciplinary**. The projects are expected to be (i) innovative, (ii) involve implementation or in-depth use of a computational method, and (iii) provide solid results. The development of projects comprises the following phases:

1. *Topic selection.* Students will form teams and select their topic by Wednesday, February 12.
2. *Project proposal.* The teams will review the literature and develop ideas for their project. Based on these ideas, they will present a proposal for their project on Monday/Wednesday, March 17/19. Other students and the instructor will provide feedback on these ideas, critically evaluating the plan to execute these ideas. The presentation will not be graded.  
  
Based on this feedback, the students will submit a *5-page research proposal* by Wednesday, March 26. The proposal will outline the motivation and the proposed idea and clearly argue for the significance and the intellectual merit of the proposed research. It should also clearly explain the research plan. The proposal will be expected to address the feedback provided during the presentations and will be graded.
3. *Project presentation and report.* On the final week of the semester, each team will present their project. Each team will also submit an *8-page project report* by Wednesday, April 30. The presentations and reports will be graded.

## Calendar

The class meetings are organized as follows: Every week (a Wednesday followed by a Monday) a different topic will be discussed. On Wednesday, the instructor will provide background on the topic. Prior to Wednesday's class meeting, review articles or book chapters on the topic will be posted on Blackboard. On the following Monday, a research paper will be discussed, and the discussion will be facilitated by a student. The topics scheduled for discussion are the following:

Date	Topic
Jan 13	Introduction to “omics”
Jan 15–22	Data on biological function and relationship among biomolecules: Signaling, pathways, protein-protein interactions, functional annotation, data and knowledge bases
Jan 27	<i>Paper Discussion #1:</i> Dutkowski et al. A gene ontology inferred from molecular networks, Nat Biotech, 2013.
Jan 29	Network analysis, graph theoretical concepts, topological properties of biological networks
Feb 3	<i>Paper Discussion #2:</i> Heo et al., Topology of protein interaction network shapes protein abundances and strengths of their functional and nonspecific interactions, PNAS, 2011.
Feb 5	Network motifs, module identification, network alignment, network evolution
Feb 10	<i>Paper Discussion #3:</i> Mazurie et al. An evolutionary and functional assessment of regulatory network motifs, Genome Biol, 2005.
Feb 12	Centrality, network based functional annotation, genome-wide linkage and association, disease gene prioritization
Feb 17	<i>Paper Discussion #4:</i> Lee et al. Prioritizing candidate disease genes by network-based boosting of genome-wide association data, Genome Res, 2012.
Feb 19	Gene expression: clustering, classification, regulatory network inference
Feb 24	<i>Paper Discussion #5:</i> Sirota et al. Discovery and preclinical validation of drug indications using compendia of public gene expression data, Science Transl Med, 2011.
Feb 26 – Mar 3	Cancer: Driver mutations, methylation, mRNA-level dysregulation, proteomics, The Cancer Genome Atlas (TCGA), prediction of patient outcome
Mar 5	<i>Paper Discussion #6:</i> Ciriello et al. Mutual exclusivity analysis identifies oncogenic network modules., Genome Res, 2012.
Mar 17–19	<u>Proposal Presentations</u>
Mar 24	Information theory and its applications in biology
Mar 26	Active pathways, dysregulated pathways, Gene-set enrichment analysis,
Mar 31	<i>Paper Discussion #7:</i> Weng et al. SNP-based pathway enrichment analysis for genome-wide association studies, BMC Bioinformatics, 2011.
Apr 2	Dysregulated subnetworks, composite gene features for classification
Apr 7	<i>Paper Discussion #8:</i> Patel et al. Network signatures of survival in glioblastoma multiforme, PLoS Comp Biol, 2013.
Apr 9	Metabolomics, metabolic networks, flux-balance analysis, metabolic pathway databases
Apr 14	<i>Paper Discussion #9:</i> Zelezniak et al. Metabolic network topology reveals transcriptional regulatory signatures of type 2 diabetes., PLoS Comp Biol, 2010.
Apr 16	<i>Paper Discussion #10:</i> Hofree et al. Network-based stratification of tumor mutations, Nat Methods, 2013.
Apr 21–23–29	<u>Project Presentations</u>

## Plagiarism Policy

All of the materials submitted by the students must be the students' own work. Zero-tolerance policy on plagiarism will be enforced. Following the departmental plagiarism policy, cheating on homeworks or tests will result in an F grade for the whole course and appropriate disciplinary action, independently of the extent of plagiarism. In case of doubt, the students are responsible for checking with the instructor on what is allowed and what is not.

# ASTR 306/406 – Astronomical Techniques

This course will focus on research techniques in astronomy, including the acquisition, reduction, and analysis of data from ground- and space-based telescopes, as well as data-mining from online multi-wavelength datasets. We will also emphasize the variety of writing that astronomers do, such as observing proposals, journal articles, technical reviews, and funding proposals. ASTR 306 is an approved SAGES departmental seminar.

**Instructor:** Chris Mihos (Sears 557, [mihos@case.edu](mailto:mihos@case.edu))

**Textbooks:** While there are no required textbooks, readings will come from a variety of sources available online and in the astronomy library, including:

- **BGO:** *Observational Astronomy*, by Birney, Gonzales, and Oesper
- **Chromey:** *To Measure the Sky*, by Chromey
- **Howell:** *Handbook of CCD Astronomy*, by Howell

**Computational Requirements:** High level computational data analysis will be required. The specific language or software you use for this analysis is your own choice — depending on the scope of the problem, any of Python, C/C++, Matlab, IRAF, or Supermongo may be appropriate. If you do not have an account on the departmental Linux workstations, please see Charley Knox to get set up ASAP.

**Individual Assignments:** Every few weeks there will be a homework set geared towards the development of technical skills. Typical assignments could include conducting a photometric analysis of astronomical image data, or downloading and analyzing appropriate astronomical datasets off of the web. In addition, there will be several individual writing assignments throughout the semester, which might include

- an observing proposal
- a grant proposal for research using an on-line database
- referee reports of the group projects

**Group Projects:** Several larger research projects will be done in small groups. For each project, the group must submit a final project report written in the form of an *Astrophysical Journal* paper. The first of these reports will be peer-reviewed by the other groups in the class, after which revisions will need to be made.

**ASTR 406 Requirements:** Graduate students enrolled in ASTR 406 will have additional problems on the individual assignments that explore topics in more detail. ASTR 406 students will also complete *individually* the group projects assigned for ASTR 306. There will also be an observing trip for ASTR 406 students to Kitt Peak, Arizona to obtain data for an additional data analysis project.

## Grading Structure:

	ASTR 306	ASTR 406
Individual Assignments	70%	55%
Projects	30%	30%
Observing Project	--	15%

## Course Topics:

- I. Astronomical Data
  - a. Coordinate systems
  - b. Magnitudes and filter systems
  - c. Extended objects: shape and structure parameters
  - d. Spectroscopic data: spectra and spectral indices
  
- II. Astronomical Instrumentation
  - a. Telescopes
  - b. Detectors and imaging
  - c. Spectrographs
  
- III. Data Reduction and Analysis
  - a. Photometry
  - b. Spectroscopy
  - c. Statistical methods
  
- IV. Multiwavelength Instrumentation and Datasets
  - a. Infrared
  - b. Radio
  - c. Ultraviolet
  - d. X-ray
  
- V. Data-Mining in Astronomy
  - a. Data products: raw data versus value-added catalogs
  - b. Simulation datasets
  - c. Online datasets: SDSS, MAST, NED, etc
  - d. Data slicing and cross-matching
  - e. Data visualization
  
- VI. Case Studies in Astronomical Data Mining
  - a. Active galaxies in clusters
  - b. Star streams in galaxies
  - c. Hunting for exoplanets
  - d. Galaxies in the early universe

Case Western Reserve University  
The Weatherhead School of Management  
MKMR 310, Fall 2013: T 11.30am-2.15pm



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## Marketing Analytics

Instructor: Jagdip Singh                      Office Hours: After class, Tuesday, or by appt.  
Course Assistant: Hector Martinez (ham48)  
Co-Instructors (listed alphabetically): Chris Linderwell & Elisabeth Smith  
(All from Rosetta; email: First name.Last name@rosetta.com)  
Contact: [jagdip.singh@case.edu](mailto:jagdip.singh@case.edu), PBL 221

### Course & Learning Objectives

Develop skills for analyzing marketing data for making intelligent decisions about marketing investments that create value and build competitive advantage. In short, this course will build capabilities for marketing **ai**—**analytics for insights**.

You might be asking, “If I am going to be a marketing professional, do I need hard analytical skills?” The answer: “Absolutely, yes.” The divide between soft and hard areas of marketing is a myth. In a digital age, marketing professionals have to be good at both to be taken seriously.

“Do you have to be a math or statistics wiz to be good at marketing analytics?” Answer: “No.” Analytics do involve knowledge of basic statistics, math and commercial software (EXCEL & SPSS). These basic skills are a necessary tool-kit for marketing professionals. Being a wiz can help, but is not necessary. At its core, analytics rely on your powers of understanding marketing problems, matching problems to appropriate analytical procedures, and extracting insights from the obtained.

This course should get you in the habit of asking, “What is the underlying problem responsible for visible symptoms in this situation?,” “What data do I need to uncover novel solutions to the problem?” and “What are the appropriate analyses for these data to draw insights?” The course will build skills for answering these questions.

In building these skills, the course will use different materials and deliverables with three common learning objectives:

1. Analytics Application (**AA**), applying covered analytical skills to analyze managerial problems with marketing data.
2. Evaluation and Plotting (**EP**), evaluating the results from analytics and plotting those that are useful for problem solving.
3. Integration and Interpretation (**II**), integrating the useful results obtained and developing an interpretation to guide managerial action.



## ***ROSETTA PARTNERSHIP***

This course will be delivered in partnership with Rosetta (<http://www.rosetta.com/>), an interactive consulting company committed to transforming marketing for the connected world. The purpose of this partnership is to:

- Enrich student learning by connecting analytical theory with real-world problem solving.
- Build skills for analytics driven insights that are relevant for tomorrow's marketplace.

To achieve these purposes, the course content and assignments are designed to (a) enable student learning by building **ai** skills using real-world problems and data, and (b) emphasize analytical tools and software that build students' **ai** competence giving them a competitive advantage for a range of marketing jobs.

### ***COURSE FORMAT:***

#### Before Each Class

- Read/Review assigned materials. Be prepared to ask questions and get clarifications.
- Review feedback on your assignment. See where you did well, and where you can improve. Bring your questions to class.
- If you have been asked by the instructor to make a class presentation, take the time to develop and sharpen your presentation skills. Present professionally.
- Be prepared for a class quiz.

#### Beginning of & During Each Class

- Be on time for class. Miss class only in extreme circumstances. Inform instructor in advance. Never miss submitting or doing your assigned work as required per class schedule.
- Be ready to show you are prepared. Ask questions. Pay attention.
- Assignments due that week will be discussed. It is your responsibility to note deadlines and obtain clarifications for completing the assignment.
- Be engaged. Think how you can use the concepts and tools for real life problems.

#### After Each Class

- Review material covered in class. Note questions, concepts or steps you don't get. Clarify in the next class.
- Re-Review analytics tutorial slides. Attempt at reproducing the results. Start working on the assigned homework and/or extra practice assignment.
- Plan for timely submission of assignment.

## **Text, Software, Cases and Readings**

**Text:** **SPSS (Required):** IBM SPSS for Introductory Statistics, Fifth Edition, George Morgan and others, Routledge, ISBN: 978-1-84872-982-7.

**EXCEL:** No textbook is assigned. Instead, links to readings and videos are provided for each session. All are free.

**Required Software:** SPSS 20 & Excel. You are *required* to download & install from Case Software Center the latest version of SPSS on your own personal computer. Also, you are expected to have the latest version of EXCEL installed on your personal computer. Both are **essential** for the course.

## **IBM© SPSS Analytics Certification (ACE)**

This course prepares you toward sitting in a SPSS certification exam sponsored by IBM. This certification is not a course requirement, but is recommended for students seeking jobs with some analytical component. By itself, this course is not sufficient preparation for this certification exam. Students are advised to take one or more SPSS-based courses that build their skills before sitting for the certification exam. Discuss options with the instructor. See <http://www-03.ibm.com/certify/certs/47100101.shtml> for more details. The IBM student portal link is [https://www.ibm.com/developerworks/community/groups/service/html/communityview?communityUId=ab443019-1134-4fbb-bc75-eccc1186b261](https://www.ibm.com/developerworks/community/groups/service/html/communityview?communityUid=ab443019-1134-4fbb-bc75-eccc1186b261)

## **Pre-requisites and Prepping for the Course**

Understanding of basic statistics (as usually covered in the core statistics course) is a pre-requisite. A good work ethic, and a positive learning attitude are keys to strong course performance.

Some prepping suggestions:

1. Review material you covered in the undergraduate statistics course. Online materials are available, usually free, for this purpose (e.g., <http://davidmlane.com/hyperstat/>; <http://onlinestatbook.com/2/index.html>).
2. Familiarize yourself with the SPSS statistical software. SPSS has a useful tutorial (under the “Help” tab in the main data screen). Many online resources are available ([http://www.hmdc.harvard.edu/projects/SPSS\\_Tutorial/spsstut.shtml](http://www.hmdc.harvard.edu/projects/SPSS_Tutorial/spsstut.shtml), <http://www.ats.ucla.edu/stat/spss/modules/default.htm>), and you can download a free “guidebook” by visiting <http://www.spsstools.net/> (use the link under “purposes”).

## **Course Structure and Expectations**

**Attendance and Conduct Policy:** You are responsible for attending all sessions. In case you have to miss a class for unavoidable reasons, inform the instructor in advance. Absence is excused only under extreme circumstances. No more than 2 excused absences will be permitted. Even for excused absences, the student will be responsible for submitting timely assignments and making up for absences. There will be no make-ups for quizzes. Each student is responsible for proper conduct. Student behavior deemed to be discreditable as determined by the instructor may result in a reduction of grade for the assignment/s involved or for the course as a whole or both.

In short: *Do your work with diligence.*

**Academic Responsibility.** All students in this course are expected to adhere to university standards of academic integrity. Cheating, plagiarism, and other forms of academic dishonesty will not be tolerated. This includes, but is not limited to: consulting with another person during an exam, turning in written work that was prepared by someone other than you, and making minor modifications to the work of someone else and turning it in as your own. *Unless properly referenced or quoted, submitted work is assumed to be original contribution of the student.* Ignorance will not be permitted as an excuse. If you are not sure whether something you plan to submit would be considered either cheating or plagiarism, it is your responsibility to ask for clarification. When your name appears on an assignment, you are responsible for the integrity of the work, even if you did not personally write the offending material. Information on citations and plagiarism can be found on the following web sites:

<http://library.case.edu/ksl/researchtools/citation/index.html> and

<http://www.indiana.edu/~wts/pamphlets/plagiarism.shtml>. The Weatherhead Academic Integrity policy can be found at

<http://bulletin.case.edu/weatherheadschoolormanagement/policies/#academicintegritypolicytext>.

**Evaluation, Grading and Conduct**

Homework Exercises (9 in all)	
Team exercise (Ex#1).....	2%
Team exercises (Ex#2-Ex#3) .....	8%
Individual Exercises (Ex#4 to Ex#9).....	25%
 Exams (3 in all; differentially weighted as noted below).....	45%
Exam I: 15%	
Exam II: 30%	
Exam III: 55%	
 In Class Quizzes.....	10%
 Class Participation & Attendance .....	10%
 Total.....	100%
 <i>Bonus points for Presentation*</i>	10%

**Grading Notes:**

**Class Participation and Attendance.** The following aspects will be considered in evaluating student’s grade:

- a. Preparedness and Attendance. Regular attendance and diligent preparation for the class is indicative of student commitment to participate in a learning environment. See attendance policy above.
- b. Active Engagement. Active participation in the class with thoughtful questions, sharing alternative perspectives, and responding critically to class discussion, especially during case study discussions.

**\*Bonus Points for Presentation.** You will earn bonus points for making presentation to the class. Presentations will be graded as per policy for class assignments (see grade computation below). To earn bonus points, the students must earn 85% (B) or higher on their presentation. No bonus points would be earned for a presentation that earns less than a B. Presentation opportunity will be available as follows:

- a. Invited Presentation. Students with outstanding submissions for homework exercises will be invited by the instructor to present their work to the class. Take this seriously. Imagine you are making a formal presentation to a client. Highlight your presentation skills.
- b. Requested Presentation. Any students can request the instructor to make a presentation based on the class exercise. Such requests must be made at least 1 week in advance of the presentation date.

**Exam.** Each exam will test for comprehension of concepts and skills developed as part of the course, and their application to analytical problems.

**Grade Computation:** Most assignments will be graded using a plus and minus system (e.g., A- and A+ and so on). Conversion of this grading system to numerical scores is provided below. Students are responsible for tracking their own overall performance using the above weighting scheme. The final grade, however, will be a letter grade based on the final numerical score without the plus and minus in accord with University guidelines.

A+ = 98, A = 95, A- = 91

B+ = 88, B = 85, B- = 81

C+ = 78, C = 75, C- = 71

D+ = 68, D = 65, D- = 61

F+ = 50, F = 30, F- = 0

#### ***SUBMISSION REQUIREMENTS AND GUIDELINES.***

All course exercises should be submitted **only** on the blackboard as per specific instructions to avoid late submission penalty (see below).

Typically, submission-feedback-rework will work as follows:

1. Assignments should be submitted in a powerpoint format, address all requirements of the assigned problem, and generally up to 10 slides of material. Text may be bulleted but must be complete with details to be understood precisely. Be concise. Avoid redundant words. Additional notes may be included in the powerpoint to explain your work.
2. Assignments will be due by Saturday, midnight. No extensions permitted (see ***Late Submissions*** below).
3. Feedback will be provided usually by Monday, 12 noon.
4. Based on the quality and creativity of your submission, the instructor may ask you to make a presentation based on your assignment in the Tuesday class with the following guidelines:
  - a. *5-7 minute presentation*
  - b. *Focus on points highlighted in the feedback. Revise and sharpen your presentation accordingly.*
  - c. *Polished and professional presentation. Assume you are presenting to a client.*
5. Students who want to rework the submission to fix things that they missed or got wrong can submit their revised work by Tuesday, 12 noon (before class).
6. The main objective of the rework is to promote learning of key concepts and skills, and not rake up grade points (see ***Re-dos*** below).
7. All rework must be done individually by the student/group, without help, assistance or guidance from other students or course assistant.

**Important:** *Label all your assignment files as instructed below:*

All individual assignments should be labeled as your lastname\_firstname\_exercisename\_MKMR 310

*Example: singh\_jagdip\_ex3\_MKMR310.pptx*

All group assignments should be labeled as: last\_names\_of\_group\_members\_exercise number\_MKMR310

*Example: singh\_smith\_thomas\_payne\_chin\_Huella\_MKMR 310.pptx*

All reports should be carefully edited to eliminate redundant materials and keep the material focused. Tightly written papers will be viewed more favorably than long-winded developments.

**Late Submissions:** Late submission will result in a letter-grade penalty. That penalty is one full letter grade for each day (or part thereof) that the submission is late. For example, an exercise would have earned a B if submitted on its due date of Saturday, will be graded C if submitted by Sunday, D if submitted by Monday, and an F if submitted thereafter. If a submission must be late due to circumstances beyond your control, contact the instructor. At his discretion and based on his assessment of the actual degree of uncontrollability of the situation, he may permit a special arrangement. The most typical special arrangement is for students who must miss class due to extreme circumstances. They are often permitted to submit the assignment *early*. It is extremely rare for the instructor to permit an extension of the due date.

**Redos.** Students are encouraged to go back to fix problems identified on their graded assignments as this ensures that students complete the learning loop. In some instances, a redo may earn you a portion of the original points, but often it may not. Redos that show student's effort in addressing the problem on their own, the nature of the problem and timely submission are all factors that go into this decision. Additional points for redos are at the instructor's discretion. The extra credit will be upto 1 point maximum (10% of grade) and usually lower. Redos are intended to promote learning and not as opportunities for making up the grade.

**Changes.** The instructor reserves the right to make changes during the semester to any aspect of syllabus that, to his judgment, are needed to achieve the learning objectives of the course.

## Weekly Schedule

**RR = Required Reading, WR = Web-based material for Review,  
HwA = Homework Assignment**

### **Aug. 27: CLASS 1**

#### **Analytics Driven Insights: Basics**

**WR:** *Big Data and Analytics*, [http://en.wikipedia.org/wiki/Big\\_data](http://en.wikipedia.org/wiki/Big_data)  
<http://www-01.ibm.com/software/info/rte/bdig/bdwa-7-post.html>  
<http://thehumanfaceofbigdata.com/>  
<http://en.wikipedia.org/wiki/Analytics>  
<https://www.ibm.com/developerworks/community/blogs/techtrends/tags/analytics,2012?lang=en>

#### **Computer Lab: Basic Analysis with XCL (Univariate)**

**RR: MLGB: Chap 1**

**WR:** "<http://www.case.edu/its/training/lyndamain.html> (LYNDA.com)  
SUMIFs in Excel: [http://www.youtube.com/watch?v=JonS\\_YuFeMQ](http://www.youtube.com/watch?v=JonS_YuFeMQ)  
Pivot in Excel: <http://www.youtube.com/watch?v=7zHLnUCtfUk>  
Vlookup in Excel: <http://www.youtube.com/watch?v=981MeKFA4W8>  
Basic Statistics in Excel:  
<http://www.youtube.com/watch?v=efdRmGqCYBk&playnext=1&list=PL2C53784A0634D33B>  
Histogram in Excel 2010: <http://www.youtube.com/watch?v=RyxPp22x9PU>"

**In-Class Activity: MLGB: IOs 1.3, 1.4 & 1.6**

**HwA: Ex#1: Due Aug. 31**

### **Sept. 3: CLASS 2**

#### **Dashboard Analytics with SPSS**

**RR:** SPSS Resources (PASW):  
<http://www.youtube.com/watch?v=5Z8RagPdmOI&feature=related>

#### **Computer Lab: Descriptive Analytics for Single Variables with EXCEL**

**RR: MLGB: Chap 3**

**WR:** "Define Variables and Marketing Terms  
<http://www.case.edu/its/training/lyndamain.html> (LYNDA.com)  
[http://www.youtube.com/watch?v=ssjuOuMkCB4&feature=mfu\\_in\\_order&list=UL](http://www.youtube.com/watch?v=ssjuOuMkCB4&feature=mfu_in_order&list=UL), &  
[http://www.youtube.com/watch?v=icgooM1K2IU&feature=mfu\\_in\\_order&list=UL](http://www.youtube.com/watch?v=icgooM1K2IU&feature=mfu_in_order&list=UL)  
<http://www.marketingpower.com/ResourceLibrary/Pages/common-marketing-terms.aspx>"  
Frequency Analysis in SPSS: <http://www.youtube.com/watch?v=24Y5w9sAOzI>  
Selecting Cases in SPSS: <http://www.youtube.com/watch?v=ero4VR7h1HU&feature=related>

**In-Class Activity: MLGB: IOs 3.2, 3.3 & 3.4;**

**Extra SPSS 3.4 & 3.5**

**HwA: Ex#2: "01.5 Data for Homework Movie\_Sport\_SPSS.sav" due Sept 7**

### **Sept. 10: CLASS 3**

#### **Web Analytics & Monetizing**

#### **Real-world Problem Solving: Rosetta**

**WR:** Web Analytics 101: <http://www.kaushik.net/avinash/web-analytics-101-definitions-goals-metrics-kpis-dimensions-targets/>  
Beginning Analytics: [http://www.youtube.com/watch?v=Hdsb\\_uH2yPU&feature=relmfu](http://www.youtube.com/watch?v=Hdsb_uH2yPU&feature=relmfu)  
Advanced Analytics: <http://www.kaushik.net/avinash/excellent-analytics-tip-11-measure-effectiveness-of-your-web-pages/>

#### **Computer Lab: Data Mining with XCL (Bivariate)**

**WR:** <http://www.kaushik.net/avinash/google-analytics-is-re-launched-do-these-five-things-first-in-v2/>

*HwA: Ex#3 due Sept. 14*

**Sept. 17: CLASS 4**

**Rosetta Case Study 1: Web Analytics in Practice  
Attribution Modeling for Interactive Data**

**WR:** <http://www.kaushik.net/avinash/multi-channel-attribution-definitions-models/>  
<http://www.kaushik.net/avinash/consumer-behavior-research-purchase-analysis/>

*HwA: Ex#4 due Sept 21*

**Sept. 24: CLASS 5**

**Rosetta Case Study 2: Attribution Modeling in Practice  
Exam Review Session**

**Oct 1: In Class Exam I (material covered till 09/24)**

**OCT. 8: CLASS 7**

**Asking Questions to Gain Deep Insights**

**WR:** Using Qualtrics for Mixed Survey Designs, <http://www.qualtrics.com/university/market-surveys/>

Survey design best practices:

<http://www.wpi.edu/academics/ATC/Collaboratory/Idea/surveypractices.html>

<http://www.customersat.com/blog/best-practices-customer-survey-design>

*HwA: Ex#5 due Oct. 12*

**Oct. 15: CLASS 8**

**Associational Analytics with SPSS**

**WR:** "[http://onlinestatbook.com/2/chi\\_square/one-way.html](http://onlinestatbook.com/2/chi_square/one-way.html)  
[http://onlinestatbook.com/2/chi\\_square/contingency.html](http://onlinestatbook.com/2/chi_square/contingency.html)"

**Real-world Problem Solving: Cleveland Cavs**

**RR: MLGB: Chapters 5 & 8**

**WR:** [http://www.youtube.com/watch?v=p-ZaWgiM\\_Yg](http://www.youtube.com/watch?v=p-ZaWgiM_Yg)

**In-Class Activity: MLGB: IOs 5.1, 5.2, 5.5. & 5.6; 8.2, 8.3, & 8.4**

*HwA: Ex#6 due Oct 19*

**Oct. 22: FALL BREAK**

**Oct. 29: CLASS 9**

**Predictive Analytics with SPSS**

**RR: MLGB: Chap 9**

**WR:** <http://onlinestatbook.com/2/regression/intro.html>

<http://www.youtube.com/watch?v=4EFXic4sGdE>

[http://onlinestatbook.com/2/regression/multiple\\_regression.html](http://onlinestatbook.com/2/regression/multiple_regression.html)

<http://onlinestatbook.com/2/regression/influential.html>"

**In-Class Activity: MLGB: IOs 9.2, 9.3, 9.4 & 9.5**

**Exam Review Session**

*HwA: Ex#7 due Nov. 03*

**Nov 5: In Class Exam II (material covered till 10/29)**

**Nov. 12: CLASS 11**

**Computer Lab: Forecasting with XCL**

**WR:** <http://www.statsoft.com/textbook/time-series-analysis/?button=3#identifying> (read sections on “Two General Aspects...” and “Trend Analysis.”)

<http://www.kaushik.net/avinash/analytics-tip-calculate-ltv-customer-lifetime-value>

<http://www.youtube.com/watch?v=BHDblh9Y1-o&feature=related> sections on “Simple Exponential Smoothing,” “Choosing the Best Value...,” and “Indices of Lack of Fit.”

<http://analysights.wordpress.com/2010/05/06/forecast-friday-topic-moving-average-methods-2/> - moving average overview

**HwA:** *Ex#8 due Nov. 16*

**Nov. 19: CLASS 13**

**Rosetta Case Study 3: Forecasting in Practice**

**A/B and Multivariate Testing**

**RR: MLGB: Chap 11**

**WR:** "<http://www.kaushik.net/avinash/experimentation-and-testing-a-primer/>

<http://www.kaushik.net/avinash/experiment-die-reasons-awesome-testing-ideas/>"

[http://onlinestatbook.com/2/analysis\\_of\\_variance/intro.html](http://onlinestatbook.com/2/analysis_of_variance/intro.html)

[http://onlinestatbook.com/2/analysis\\_of\\_variance/anova\\_designs.html](http://onlinestatbook.com/2/analysis_of_variance/anova_designs.html)

[http://onlinestatbook.com/2/analysis\\_of\\_variance/one-way.html](http://onlinestatbook.com/2/analysis_of_variance/one-way.html)

[http://onlinestatbook.com/2/analysis\\_of\\_variance/multiway.html](http://onlinestatbook.com/2/analysis_of_variance/multiway.html)"

<http://www.kaushik.net/avinash/analytics-tip-calculate-ltv-customer-lifetime-value/>

**In-Class Activity: MLGB: IQs 11.2, 11.4, & 11.5**

**HwA:** *Ex#9 due Nov 23*

**Nov. 26: CLASS 15**

**Rosetta Case Study 4: A/B Testing in Practice**

**Exam Review Session**

**Dec. 03: In Class Exam III (Comprehensive material covered till 11/26)**



# Measuring Marketing Performance

## MKMR 308

Weatherhead School of Management  
Case Western Reserve University  
(Spring 2014)

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Instructor: Rakesh Niraj  
Email: [rakesh.niraj@case.edu](mailto:rakesh.niraj@case.edu)  
Class: Tuesdays/Thursdays – 2.45 PM to 4.00 PM, meets in PBL 07  
Office: Location – PBL 235 Phone – 216 368 0799  
Office hours: Tuesdays/Thursdays at 4.15 PM and by appointment.  
Online resource: <http://blackboard.case.edu>

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### **REQUIRED COURSE MATERIALS:**

#### **Text books (available at Case bookstore)**

- Data Driven Marketing – by Mark Jeffery – Wiley – ISBN 978-0-470-50454-3
- I B M SPSS for Introductory Statistics (5<sup>th</sup> Ed.) – by Morgan, Leech, Gloeckner and Barrett – Routledge – ISBN 978-1-848-72982-7

### **Course Notes**

Blackboard would contain some required and suggested readings as well as information related to the course such as announcements, grades, group projects and also other documents. Other relevant and topical material may be distributed in class.

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### **COURSE DESCRIPTION AND OBJECTIVES:**

#### **Objectives**

This course is aimed at training the next generation of marketing managers who are (1) well versed in data analysis and (2) are thoroughly familiar with metrics that measure marketing performance and are able to calculate as well as convey them to other managers, especially upper management, who are often interested in the financial results and metrics.

#### **Skills**

The course will have the following takeaways for the students:

- Familiarity with data management and manipulation as well as basic statistical analyses using IBM SPSS software program. It is expected that you will consider taking the IBM Analytics Certification after taking this class.
- Understanding and greater appreciation of links between marketing actions and financial outcomes.
- Ability to fully understand, calculate and convey a small number of important metrics that measure marketing metrics in various contexts.

#### **Class Format**

The class will be largely delivered in the computer lab and therefore, it will be intensely hands on. Note that even though all class meetings are in the computer lab, not all content will require computer work all the time. Many of you might have continued access to SPSS from your previous courses (like MKMR 310), but if you do not, then it is highly recommended that you buy SPSS student access through CWRU software center for your laptop computer. The SPSS part of the class will help you get familiar with (or reinforce your

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familiarity with) the software and therefore, it would largely consist of discussions, problem solving and computer activities. The performance metrics part will also be hands on with the help of Excel spreadsheets, but may also have some more discussion on the underlying concepts and latest developments in the form of lectures and guest-lectures.

The tentative course content of the three modules of the class is given below:

- (1) Data Management – with SPSS
  - a. Reading Data from various sources
  - b. Transforming and recoding data of various type
  - c. Data cleaning – removing duplicates
  - d. Aggregating data
  - e. Merging files – by adding cases as well as variables
  - f. Analyzing Multiple Response Questions
  - g. Charts, tables and other outputs with SPSS
- (2) Introductory Statistics – with SPSS
  - a. Levels of Measurement
  - b. Descriptive Statistics
  - c. From sample to population – inferential statistics
  - d. Comparing two groups – t tests and non-parametric tests
  - e. Comparing multiple groups – ANOVA
  - f. Association between two variables
- (3) Metrics for conveying marketing performance
  - a. Data driven marketing
  - b. Essential non-financial metrics
  - c. ROI: Profits, NPV, IRR and payback period
  - d. Customer focused metrics
  - e. Internet marketing metrics

### **CLASS ASSESSMENT:**

Course grading will be done for a total of 500 points. Individual course-grading elements will not be curved and the final letter grade will be based on your absolute performance in all the aspects of the class. The table below summarizes the components you will be evaluated upon and the corresponding percentage distribution.

### **Individual Assignments**

There will be a total of 5 individual assignments (two from the metrics portion and three from the SPSS portion) and the best 4 of these assignments will count (40 points each). These are individual assignments based on marketing data and examples. You need to complete them using appropriate software and then *create single Microsoft Word files for submission through Blackboard's SafeAssign* feature. Discussing the assignment with others is not only allowed, but encouraged. However, the final submission must be demonstrably your own work. Thus, it should not be copy of the same computer output as another student's submission, and the explanations and descriptions should be completely in your own words.

### **In-class computer based exercises**

There will be in-class exercises almost every week. These will be short exercises of about 15-20 minute duration each. A total of 11 weekly exercises will be given and the best 9 will count (10 points each). These will usually be open-book, open notes, open blackboard material. External websites may be blocked for many of these.

### **Exams**

There will be two in-class examinations (75 points each) in-lieu of mid-term exam for the SPSS part of the class (in weeks 5 and 9) and one final exam on the performance metric part (during exam week) will be given (100 points). The final exam will be non-cumulative. These will also usually be open-book, open notes, open blackboard material. External websites may be blocked for some of these.

<b>Component</b>	<b>Percent of the Grade</b>	<b>Important Dates</b>	<b>Remarks</b>
Individual Assignments (4)	32%	5 given – due in week 3, 6, 10, 12 and 14.	40 points each X 4 best
In-class exercises (9)	18 %	Almost weekly: except Weeks 4, 9 and 14 - Thursdays.	10 points each X 9 best
In-Class Exam I	15%	Week 4 - Thursday	75 points
In-Class Exam II	15%	Week 10 - Tuesday	75 points
Final examination	20 %	Exam week	100 points

### **Class attendance and participation**

Since the classes are expected to be hands-on, fully engaged participation, including regular attendance is necessary. I will, however, not take attendance. There is no make-up test for the in-class exercises, except for documented illnesses and documented school-approved sports or other engagement. Since you can miss two of these without much adverse consequences, request for make-up tests will NOT be entertained except for the two reasons expressed above.

You will have a clear idea about what is to be covered in the class and you should be ready for the topic. There is cold calling in the class so students might be randomly picked as we go through the topics for the day. There will often a graduate assistant present to guide you through the hands-on portion of the SPSS software based instructions.

### **OTHER IMPORTANT ISSUES:**

#### **Teamwork**

The class does not have a team-evaluation component. However, you are encouraged to work in teams. You are encouraged to make teams, meet me in teams for problem-solving and work on assignments together – of course, your final submission of the assignments should be strictly your own work and any writing should be in your own words.

### **Academic Integrity**

Members of the class are expected to adhere to the principles of academic integrity that govern students at an institution of higher learning. For all the homework assignments, it is acceptable to have discussions with other classmates but the final submissions must be demonstrably your own work. You need to present the answer in your own words and do not turn in exactly the same computer output, for example. The two in-class examinations and the final examinations will be closed book and no help should be sought / given during these exams.

### **Special Needs**

Please contact me as soon as possible with the required paperwork, if you need and qualify for special accommodations as per the university policy.

### **Instructor Feedback**

Your instructor and the Weatherhead School are committed to continuous improvement in the quality of teaching and learning. Please feel free to speak to me (or email me) at any time about any aspect of this course, including things that you think are going well, or things that need to be improved.

## Summary Weekly Schedule

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Weeks 1 to 3: Data management and manipulation using IBM SPSS software [1 individual assignment given and 3 in-class exercise, every Thursday]

Week 4: Review and catch-up of Data management (Tuesday) and in-class exam – I (Thursday)

Weeks 5 to 8: Statistical analysis using IBM-SPSS software [2 individual assignment given and 4 in-class exercises, every Thursday]

Week 9: Review and catch-up of Introductory Statistics (Tuesday) and Start of 15 Metrics for Marketing (Thursday)

Week 10 (Tuesday): in-class exam–II {Moved to this week so there is some time after Spring Break}

Weeks 10 (Thursday) to week 14: The 15 metrics everyone in marketing should know [2 individual assignment given and 4 in-class exercises, every Thursday, except week 14] – Last class will be a review for final exam.

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**Final week: 2.5 hour final exam – May 1<sup>st</sup>, 12.30 PM to 3 PM.**

**Case Western Reserve University  
The Weatherhead School of Management**

**Marketing Management**

**MKMR 301  
Course Syllabus  
Fall 2012**

**General Information**

**Instructor:** Casey E. Newmeyer

**Contact Information:**

Email: cen12@case.edu

Office: 223 PBL

Phone: (216) 368 - 6404

**Class Meeting Times:** Tuesday and Thursday 1:15 pm – 2:30 pm

**Class Location:** PBL Room ???

**Course Description**

This course will provide students with a broad understanding of the marketing function in the modern world. It is designed to provide students both a theoretical and practical understanding of marketing decision-making. Topics covered in this course include the marketing environment for domestic and international marketing, marketing information systems, consumer and industrial buying behavior, target marketing, the formulation of marketing strategy involving the elements of product, distribution, promotion and pricing elements, and finally, market planning, organization, implementation, and control. Ethical considerations and a global view are incorporated into these topics, throughout the course.

The main learning objectives of this course include understanding:

- What marketing is
- How marketing is incorporated into the firm and its business plan
- The specific functions of marketing: product, place, price, promotion, people
- How marketing actions increase firm value

**Required Materials:**

- MKTG 5, 5<sup>th</sup> Edition  
by Lamb, Hair, McDaniel (ISBN-10: 1111528098 ISBN-13: 9781111528096)

### In-class Assignments/Quizzes

During the course of the semester multiple quizzes and/or assignments will be given in class or announced and given in Blackboard. These could include material to be covered that day from the text. The point value for each quiz/assignment will vary based on the requirements of the quiz/assignment. If you are absent from class the day a quiz/assignment is presented you will receive a zero for that particular item. Make-ups are granted at the instructor's discretion and only for documented excuses.

### Case Discussions/Questions

Two cases will be posted in Blackboard, for which you will prepare a typed response to open-ended questions. Remember to use proper MLA in-text citations when preparing your case responses and to use the proper format.

### Class Participation and Discussion

Class participation will represent a substantial portion of the grade. Students will be expected to ask relevant questions, provide thoughtful comments and bring appropriate current-events examples of marketing and branding issues to class for discussion. Regular engagement is expected with the professor, fellow students and any guest speakers. The emphasis for grading will be on quality, not quantity.

You are expected to come to class thoroughly familiar with and ready to discuss assigned reading material and cases. Your simply showing up for class is useful for you, but adds little or no value to your colleagues' learning experiences. All students are expected to contribute to each others' learning. "Thoroughly familiar" means, not only being ready and able to discuss the main points addressed in the reading materials, but also being ready and able to discuss the nuances of their implications conceptually, for managerial decision making, and marketing performance.

Your class participation grade will also consist of unannounced in-class exercises and assignments.

### Video Clip Assignment

This assignment requires the student to recognize course concepts in the mass media. This assignment consists of a brief class presentation and a one page summary presented to the instructor. The ideal assignment will identify one or two marketing principles depicted in a video or audio clip from a movie, TV program or in a radio segment. Students will work in teams of 2 and sign up for one of 4 presentation dates (Groups 1-4 on the course schedule). Further details will be posted on Courseweb.

### Exams

Three regular exams and one final exam are scheduled for the semester. The final exam is cumulative. Exams could be a combination of multiple choice, true-false, matching, ordering, fill-in-the-blank, and short-answer.

## Grades

- Video Clip Assignment 5%
- Class Participation 15%
- Case Write-ups (2 @ 7.5%) 15%
- Chapter Exams (3@10%) 30%
- Marketing Plan 10%
- Quant Project 10%
- Final Exam 15%

## Course Schedule

<b>Date</b>	<b>Topics</b>	<b>Reading</b>	<b>Assignment</b>
August 28	Introduction and Syllabus Overview		Details of the deliverables needed will be discussed in-class and posted on blackboard
August 30	Chapter 1: An Overview of Marketing	Chapter 1	
September 4	Strategic Planning	Chapter 2	
September 6	Ethics and Social Responsibility and the Marketing Environment	Chapter 3 & 4	
September 11	Developing a Global Vision	Chapter 5	
September 13	Case Discussion 1		Case 1 written questions due
September 18	Consumer Decision Making	Chapter 6	
September 20	Decision Making cont.		Group 1: Video Clip Assignment
September 25	Segmenting & Targeting Markets & Exam 1 Q&A	Chapter 8	
September 27	EXAM 1 – Chapter 1, 3, 4, 5, 6, 8		
October 2	Decision Support Systems & Marketing Research	Chapter 9	Group 2: Video Clip Assignment
October 4	Product Concepts	Chapter 10	
October 9	Developing & Managing Products	Chapter 11	
October 11	Products cont. Exam 2 Review		Group 3: Video Clip Assignment
October 16	Exam 2 – Chapters 9, 2, 10, 11 & 12		
October 18	Marketing Channels & Supply Chain Management	Chapter 13, 14	
October 23	Fall Break		
October 25	Integrated Marketing Communications	Chapter 16	
October 30	Advertising & Public Relations	Chapter 17	Group 4: Video Clip Assignment
November 1	EXAM 3 Chapters 13, 14, 19, 20, 16, 17 & 18		
November 6	Sales Promotion & Personal Selling	Chapter 18	
November 8	Thanksgiving Break		
November 13	Case 2 Discussion		Case 2 Written Questions Due
November 15	Pricing Concepts	Chapter 19	
November 20	Setting the Right Price	Chapter 20	
November 22			Quant Project
November 27	Group Presentations		Marketing Plan Presentations
November 29	Group Presentations		Marketing Plan Presentations
December 4	Social Media	Chapter 22	
December 6	Course Wrap-up/Final Review		
December 13, 12:30pm	FINAL EXAM		



**CWRU Academic Integrity Policy**

All students in this course are expected to adhere to university standards of academic integrity located at: <http://studentaffairs.case.edu/groups/aiboard/policy.html>. You are responsible for familiarizing yourself with the University Honor Policy. All students in this course are expected to adhere to university standards of academic integrity. Cheating, plagiarism, and other forms of academic dishonesty will not be tolerated in this course. This includes, but is not limited to, consulting with another person during an exam, turning in written work that was prepared by someone other than you, and making minor modifications to the work of someone else and turning it in as your own. Ignorance will not be permitted as an excuse. If you are not sure whether something you plan to submit would be considered either cheating or plagiarism, please do not hesitate to ask me. Any cheating, plagiarism, or other forms of academic dishonesty will result in a grade of “F” for this course, as well as the notification of the appropriate Weatherhead School of Management authority.

**Disability**

Students at Case Western Reserve University are not required to disclose disability information to anyone. However, in order to use services and appropriate accommodations, students should notify Disability Resources in Educational Services for Students at [216.368.5230](tel:216.368.5230) or [disability@case.edu](mailto:disability@case.edu). Disability Resources is located in Sears room 470.

# Basic Statistics for Engineering and Science

Stat 312 – Spring 2014

## Syllabus

- Instructor: Danhong Song, Ph.D  
Room 375, Yost Hall 216-368-2918 [danhong.song@case.edu](mailto:danhong.song@case.edu)
- Office hours: 2:40 – 4:00 pm, Tuesdays and Thursdays, or by appointments
- Class Time: T R 1:15 – 2:30 pm
- Location: Room 400, Nord Hall
- Prerequisites: MATH 122 or equivalent.
- Text Book: Engineering Statistics, 5<sup>th</sup> Ed, Montgomery, Runger, and Hubele, Wiley, 2011, ISBN-13 978-0-470-63147-8
- Coverage: Chapters 1 – 6 (tentatively):  
Ch 1 The Role of Statistics in Engineering  
Ch 2 Data Summary and Presentation  
Ch 3 Random Variables and Probability Distributions  
Ch 4 Decision Making for a Single Sample  
Ch 5 Decision Making for Two Samples  
Ch 6 Building Empirical Models
- Homework: Homework problems will be assigned regularly along with a due date (usually Thursdays). Homework must be turned in, on the due date, in class, before the class starts.
- Exams: There will be two in-class exams (75 min.) during the semester and an in-class comprehensive final exam (3 hours) at the end of the semester on the following dates. Students must bring a calculator. However, cell phones are not permitted to be used as calculators for the exams. Make up exams may be given with an advanced notice.
- Mid-terms: Tuesdays, Feb. 18 and April 8 (**tentatively**)  
Final Exam: 12:30 - 3:30 pm, Monday, May 5, 2014.
- Grading: The final grade will be based on a composite score of all the points coming from the exams and homework. The break up for the final grade will be as follows:

Homework:	20%
Mid-Terms:	45%
Final Exam:	35%

**A: 90 -100 B: 80 - 89 C: 70 - 79 D: 60 - 69 F: 59 and below**

**Website:** The course website is <http://blackboard.case.edu>. To log in you need to use your case ID and password. After logging in, go to the appropriate **STAT 312** under “My Courses”.

**Help:** Hayley Topel ([hmt17@case.edu](mailto:hmt17@case.edu)) and Janis Cava ([jac256@case.edu](mailto:jac256@case.edu)) will be my TAs for this course during the semester. They will provide tutoring help and share the responsibilities of grading. For tutoring, both Hayley and Janis will be able to tutor on Mondays in room 374 Yost. Here are their hours:

Hayley: 10:00-11:30 am on Mondays and  
Janis: 4:40-5:30 on Mondays

Also, please don't forget about my office hours. I will be glad to help you.

**NOTE:** The instructor reserves the right to make any changes she considers academically advisable. It is the student's responsibility to attend classes and keep track of the proceedings.

**STAT 201**  
**Spring 2014**  
**TR 1:15-2:30 PM, Wickenden 301**

**Instructor:** *Dr. Patricia Pepple Williamson*  
*342 Yost Hall, 368-6013*  
*email: patricia.williamson@case.edu*  
*Office Hours: 1:30-3:30 MW, 12:00-1:00 TR*

**Textbook:** *Introduction to the Practice of Statistics, 7th edition, by Moore McCabe, and Craig.*

**Grading:** *Two tests and a comprehensive final exam will be given. Fifteen take home quizzes will be given of which the top 12 will be counted. You are not to work with anyone on the quizzes; each quiz should be your own work. If there is a question on a quiz, consult me.*

<i>Quizzes</i>	<i>- 120 points (25%)</i>
<i>2 Tests</i>	<i>- 200 points (41.7%)</i>
<i><u>Comprehensive Final</u></i>	<i><u>- 160 points (33.3%)</u></i>
<i>Total</i>	<i>- 480 points</i>

<b>Grading</b>	<i>90 - 100%</i>	<i>A</i>
<b>Scale:</b>	<i>80 - 89.99%</i>	<i>B</i>
	<i>70 - 79.99%</i>	<i>C</i>
	<i>60 - 69.99%</i>	<i>D</i>
	<i>59.99% and below</i>	<i>F</i>

**Make-up Policy:** *No make-up tests or quizzes will be given. Students who know in advance that they must miss a test due to exceptional circumstances may be able to take the test in advance. Please inform me of any problems as soon as possible.*

**Help:** *Please feel free to see me about any questions you have during my office hours; other times can possibly be arranged. I will be glad to help you.*

**Withdrawal:** *Last day to withdraw with a mark of "W" is March 28, 2014 (April 28 for first year undergraduates).*

**Student Conduct:** *Be advised that students are expected to behave appropriately in class. Please turn off cell phones as well.*

**Attendance:** *Attendance is important for adequate student comprehension. Also, to have 15 take home quizzes, it is obvious that they are given out frequently so you need to be in class to get the quizzes. If you have to miss a class, it is your responsibility to find out what you missed. Students must be in class to obtain a quiz except at most two quizzes that can be sent via email with acceptable excuses.*

**Homework:** *Problems will be assigned regularly throughout the course, but will not be collected or graded. Keeping up with homework assignments is the responsibility of the student and plays an important part in the mastery of course material. Answers to most odd problems are available in the back of the textbook.*

**Website:** *The course website is <http://blackboard.case.edu>. To log in you need to use your caseID and password. After logging in, go to **STAT 201** under "My Courses". I strongly suggest you copy the Power Point slides for each chapter/section (posted under "Course Documents") and bring the appropriate chapter notes to class.*

**Calculator Use:** *Cell phones are not permitted to be used as calculators for tests.*

**Computer Access:** *I expect students to have access to a computer where they have Excel, Minitab, and R; R can be downloaded from the internet. The instructions to download R are given below.*

**To download R:**

1. Go to [www.google.com](http://www.google.com).
2. Type in "R".
3. Click top entry.
4. Click on CRAN mirror.
5. Under USA, click on <http://cran.case.edu/>
6. Click on Windows for those with windows.
7. Click on base.
8. Click on Download R 3.0.2 for Windows.
9. Continue through process as directed.

*You should end up with R on your desktop.*

*Of course, if you don't have windows, adapt accordingly.*

# EECS 132 Spring 2014

## DESCRIPTION

### Course Description

Introduction to computer programming and problem solving with the Java language. Computers, operating systems, and Java applications; software development; conditional statements; loops; methods; arrays; classes and objects; object-oriented design; unit testing; strings and text I/O; inheritance and polymorphism; GUI components; application testing; abstract classes and interfaces; exception handling; files and streams; GUI event handling; generics; collections; threads; comparison of Java to C, C++, and C#.

### Course Outline

The course will cover the following topics. The order is subject to change:

- A brief history of programming
- Data, primitive data types, class data types
- Methods
- Computer organization and the Java memory model
- Conditional statements, recursion
- Loops
- Strings and Arrays
- Polymorphism, subclasses, abstract classes, interfaces
- Industrial programming techniques: paired programming, API generation
- Graphical User Interfaces and event-driven programming
- Introduction to computer science: program correctness and runtime analysis
- Industrial programming techniques: testing, debuggers, and JUnit
- File input and output
- Building applications; the main method
- Exception handling
- Abstract data types; generic types; linked lists
- Collections; iterators; comparable types
- Inner and anonymous classes
- Java reflection
- Multi-threaded programming

## COURSE INFORMATION

**Instructor:** Harold Connamacher

- Office: Olin 502
- Office Hours: Monday 4–5pm, Tuesday 9–10am, Wednesday 4–5pm, Thursday 9–10

**Timetable:**

- Lecture: Monday, Wednesday, Friday, 2:00pm in Millis Schmitt Lecture Hall

- Recitation Lab: Wednesday 3:00 pm –or– Wednesday 4:00 pm –or– Thursday 1:15pm –or– Thursday 2:45p in Olin 803

Because all recitation sections are full, please attend your assigned recitation lab. If you need to change recitation sections, please speak to the course instructor.

### Course Textbook:

- **Required Book:** Flanagan, Java in a Nutshell, 5th edition, 2005. ISBN 9780596007737
- **Recommended Book:** Lewis and Lofton, Java Software Solutions, 7th edition, 2012 (with electronic resource access). ISBN 9780132760775

The second book is strongly recommended for any student who does not have prior experience with computer programming.

### Prerequisites:

- None

## COURSE ASSESSMENT

To help you learn the material, there will be regular assignments and assessments covering different aspects of programming in Java.

**Late Work Policy:**The late policy for each assessment is listed in the assessment description. The only exceptions are for medical or similar emergencies, and in such situations work will only be accepted with notice from an appropriate university official. If you have to miss class due to a scheduled event such as a sporting event or club performance, you must make arrangements to submit your required work early.

**Prelabs:**The prelab is a short exercise to be completed each weekend. The prelab is due each Wednesday at 2pm beginning Wednesday, January 22. **No late submissions will be accepted.** The purpose of the prelab is to reinforce certain Java techniques that will be used in the next lab session so that your lab session will be more productive. The prelab is expected to be entirely your own work, and you will receive full credit as long as it is mostly correct.

**Quizzes:**There will be a short quiz to be completed each week. The quizzes are posted each Friday, starting January 17 and due the following Tuesday. **No late submissions will be accepted.** The quiz will cover material from the previous week lecture. The quiz is expected to be your own work. You will be permitted to take the quiz twice. After the first attempt, you will be told which answers were incorrect and you may look up the correct answers in your notes or the textbook.

**Optional MyProgrammingLab:**MyProgrammingLab is an on-line Java quiz/program practice that goes with the Lewis textbook. MyProgrammingLab is optional and recommended for students with no prior programming experience. New MyProgrammingLab questions will be posted each week. If you choose to do the MyProgrammingLab, you may replace either your term Prelab or Quiz grade with the term MyProgrammingLab grade

MyProgrammingLab access is included when you purchase the Lewis textbook. **You may purchase MyProgrammingLab separately.** Go to [myprogramminglab.com](http://myprogramminglab.com) to register.

**Labs:**There will be a lab/recitation section every week beginning Wednesday, January 15. The lab will consist of an exercise you are to complete in the hour provided. The lab serves two purposes: to give you hands on practice with Java concepts, and to introduce you to the industrial technique

of paired-programming. You are encouraged to have a lab partner. If you have a lab partner, your lab grade will be determined by how well you follow the paired-programming technique and whether you focused on the lab task for the entire hour. If you do not have a lab partner (for example you miss the lab due to illness), you will not be practicing paired-programming and so your grade will be determined only by the correctness of your lab results. **If you are unable to attend the lab session, you can have an automatic extension. The lab must be submitted no later than the Tuesday following the lab section.**

**Programming Projects:** There will be a programming project assigned every two weeks starting the fourth week of the course. The first project will be assigned Friday, February 7 and will be due Friday, February 21. Each homework will consist of Java programming. In addition, there will be written work to include with the program. All homework is assumed to be your own work. **The late policy for homework is as follows: -10% if within one hour late. -25% if within 24 hours late. -50% if over 24 hours late. There will be no homework accepted once the grading is done or after a week past the deadline.**

**Midterm:** The midterm exam will consist of short answer, fill in the blank, and free response sections. You may be asked to provide correct Java code or proper English descriptions for the questions asked. The midterm will be in class on Monday, March 3.

**Final:** The final exam is at the time specified by the registrar: Monday, May 5 at 8:30 am. The exam will be the same format as the midterm exam, and the exam will be cumulative.

**Calculators:** You are permitted to use calculators on prelabs, labs, homework, and quizzes. No calculators will be permitted on midterms and finals.

### Grading Scheme:

Prelabs: 5% \*  
Labs: 10%  
Quizzes: 5% \*  
Homework: 30%  
Midterm: 15%  
Final Exam: 35%

\* You may replace either the 5% quiz grade or the 5% prelabs grade with a 5% MyProgrammingLab grade.

### Grade scale:

The class will use the following scale to translate your percentage grade to a final grade.

If your percentage grade is at least	Your final grade will be at least
90	A
80	B
70	C
60	D

You must score at least 50% on the final exam to pass the course.

### Academic Honesty

Please see the general [University Policy on Academic Integrity](#). The specifics for the course are



listed in the document, Course Honor Policy, found on this site.

## **Special Considerations**

**Physical Disabilities or Other Hardships:** If you have a physical disability or other hardship that can potentially put you at a disadvantage in this course, please see [Educational Student Services](#). They will make certain you receive the necessary accommodations so that you may perform your best.

**Religious Holidays:** I strive to schedule all major projects and tests so that they do not conflict with important religious holidays. However, I am not always successful in doing that. If an important religious holiday conflicts with a class test or assignment in a way that makes it so that you can not take the test or complete the assignment as originally assigned, please see me as soon as possible to make necessary arrangements.

# ENGR 131: Elementary Computer Programming

Instructor: Dr. Chris Fietkiewicz

Email: Use help addresses listed on the website

Instructor Office Hours: Immediately after lectures and by appointment

Teaching Assistant Office Hours: See the website

## Websites

Primary website: <http://blackboard.case.edu>

Textbook source code: <http://www.elsevierdirect.com/9780123850812> (click on link for “Companion Website”)

## Getting Help

*Email:* Use the “help” email address for your lab section (see the website for the list). Email sent to this address goes to several TAs for the fastest reply possible.

*Office hours:* Supplemental Instruction (SI) sessions will be available on different days throughout the week. Each TA will also hold weekly office hours. See the website for the complete schedule of SI sessions and TA office hours.

*Tutoring:* Complimentary tutoring is available through ESS Peer Tutoring services. To sign up, go to the ESS web page, <http://studentaffairs.case.edu/education/>, and click on “TutorTrac”. Tell your tutor to contact Chris if he or she has any questions.

## Course Description

The goals of this course are to (1) develop skills in computational thinking through problem solving and (2) learn the practical skill of programming in MATLAB. Topics covered include algorithm design, data structures, operators, control flow, and functions.

## Textbook

Book: Attaway, *MATLAB: A Practical Introduction to Programming and Problem Solving*, Second Edition, Butterworth-Heinemann, 2011. ISBN 978-0123850812.

Website with M-files: *see link above*

## Specific Topics

Ch 1: MATLAB calculations

Ch 2: MATLAB programming

Ch 3: Selection

Ch 4: Repetition

Ch 5: Vectorization

Ch 6: Advanced programming

Ch 7: Strings

Ch 8: Data Structures

Ch 9: File Input/Output  
Ch 10: Advanced functions  
Ch 11: Advanced plotting  
Ch 12: Systems of linear algebraic equations  
Ch 13: Statistics and advanced algorithms  
Ch 14: Audio and graphics  
Ch 15: Advanced mathematics

## Labs & Software

All students will have 24-hour access to the Olin 8<sup>th</sup> floor lab (x4056). The [Nord Lab](#) computers can also be used. The Olin lab and all equipment are to be used for coursework only. Any unauthorized use of the lab or equipment may result in failure for the course. MATLAB software is available from <https://softwarecenter.case.edu>, and students are encouraged to install it on their personal computer.

NOTE: To use MATLAB off campus, you may need to use the AnyConnect software for virtual private networking (VPN) which is available at <https://vpnsetup.case.edu>.

## Attendance

*Lab:* Lab attendance is required, and students must be present to receive credit for lab assignments. If you have a valid excuse for missing a lab meeting, contact your TA immediately using the “help” email address.

*Lecture:* Attendance is not required for actual lectures (including lectures after a quiz). However, lecture activities will be collected randomly to check attendance which can improve your course grade (see *Borderline Grades* below). Students with valid excuses for missing a lecture can request makeup work in order to obtain attendance credit.

*Respect:* Except for excused absences, it will be assumed that students who are not present during lecture or lab do not need further assistance with the material covered. Please be respectful and use our scheduled time on Tuesdays and Thursdays to seek help. At the end of the semester, grades within 1 point of the next highest letter grade *might* be raised at the instructor’s discretion for students with perfect attendance and perfect assignment completion.

## Grading

The grade cutoffs are 90-80-70-60 percent for A-B-C-D respectively. The following weights will be applied to the average percentage for each category. Items from different categories may have the same total number of points, but they do not have the same contribution to the final grade. For example, an exam and a quiz may each have a maximum of 100 points, but the contribution of each depends on the number of exams, the number of quizzes, and the weight of each category.

(15%) Lab Assignments: Lab assignments are collected every week in lab. Students must be present to receive credit. Assignments cannot be made up except for excused absences.

(5%) Homework: Homework problems will be graded for completeness and not correctness.

(20%) Lecture quizzes: Quizzes will occur at the beginning of selected lectures. They will cover material in the homework problems.

(50%) Exams: There are three required midterm exams. An unexcused absence will result in a zero for that exam. Students will have the option (not required) to take a comprehensive final exam that will count as a fourth exam. The average of all exams taken (either 3 or 4) is worth 50% of the final grade.

(10%) Final Project: A software development project is assigned at the end of the semester. Students must choose a particular design within the guidelines provided. Students are required to work in groups of two or three. Students are not permitted to work independently.

*Late submissions:* Late submissions for lab assignments and final projects will receive a penalty of  $-0.07$  points for each minute past the due date. Exams and quizzes will not be accepted late except for excused absences (see “Absences” below).

*Absences:* Non-emergency absences must be approved in advance, including Case-sponsored trips. Makeup exams will be only be provided for excused absences in accordance with university policy. Students with valid excuses for missing a lecture can request makeup work in order to obtain attendance credit.

*Borderline grades:* At the end of the semester, students who are within 1% of the next highest letter grade may receive the higher letter grade, at the instructor’s discretion, if all of the following conditions are met:

- The student has perfect lecture attendance (based on collected lecture activities).
- The student submitted all assignments, including every lab, homework, quiz, exam, and final project component.
- The student received a score of 80 or higher on the final exam.
- The student has not violated any course policies.

## Assignment Philosophy

There are different types of assignments in the course:

- Tutorials (*not* graded)
- Lab assignments (graded for correctness)
- Homework problems (graded for completeness, *not* correctness)

These are specifically designed to work together to prepare you for the quizzes and exams. Each one requires an additional level of ability. A homework problem is the most important opportunity for a student to practice with a large problem independently prior to a lecture quiz. Therefore students are encouraged to complete all homework problems independently. Asking for help is fine, but your results will be superior if all work is your own.

## Academic Integrity

All homework submitted should be the student’s own work. This includes the design of programs as well as the actual computer code. Students are encouraged to seek assistance from their TA and the instructor to ensure that homework study is approached properly. Students found in violation of the [university’s academic integrity policy](#) will be reported to the Dean’s office and will receive either a permanent zero on the assignment in question or failure for the course.

## Friendly Advice: The Proactive Student

The truly successful people in life are the ones who know how to get what they want. They also know they are the only ones responsible for making it happen. Many students come to college thinking they can succeed by simply doing what they are told. It is not uncommon to hear the complaint, "You didn't tell us we had to know *that!*" Success in college, as well as in life, comes from *self*-discovery, which includes discovering things *by* oneself as well as discovering things *about* oneself. One of the instructor's jobs is to show students where to look. It is the students' responsibility to know whether they have found what they needed and to seek out help when they are uncertain. Please be proactive about your education, and do not wait for your instructors to tell you when you don't know something.

## Chapter 3: Part II

### ARTICLE II. Policy for Responding to Allegations of Research Misconduct\*

#### Sec. A. Introduction

##### 1. General Policy

Research misconduct will not be tolerated or accepted at Case Western Reserve University. Scientific integrity and ethics are highly valued and expected from all members of the University community. While ensuring compliance, the University will make all efforts to protect the rights and reputations of all individuals including the respondent and good faith complainant.

The University will ~~regularly educate~~ provide information to researchers and staff members on the policies related to research misconduct and the importance of compliance. Preventative measures are by far the most productive and least damaging to all involved. Our goal is to initiate department-level discussions among students, faculty, and staff researchers to examine the contemporary stresses felt on academic research ethics, and to consider ways to deal with those stresses. The University supports Responsible Conduct of Research (RCR) training efforts across campus and expects individual researchers to be actively engaged in meeting the RCR educational requirements of funding agencies.

The University's basic procedural approach to handling allegations of research misconduct is to investigate as soon as misconduct is suspected, inform and cooperate with the Office of Research Integrity (ORI), and to follow the proceeding policies.

##### ~~2.~~ Scope

This policy and the associated procedures apply to all individuals at Case Western Reserve University engaged in any research whether it is supported by the U.S. Public Health Service (PHS) or not. The PHS regulation, 42 Code of Federal Regulations (CFR) Part 93, applies to any research, research-training or research-related grant or cooperative agreement with PHS. This University policy applies to any person paid by, under the control of, or affiliated with the institution, such as scientists, trainees, technicians and other staff members, students, fellows, guest researchers, or collaborators at Case Western Reserve University. While the University's authority to investigate, to compel cooperation, and to impose sanctions against those who are not members of the University Community is limited, the University will nonetheless investigate all

allegations of misconduct involving research.

~~The policy and associated procedures will normally be followed when an allegation of possible research misconduct is received by a University official. Particular circumstances in an individual case may dictate variation from the normal procedure, when such variations are deemed to be in the best interests of Case Western Reserve University and PHS. Any change from normal procedures also must ensure fair treatment to the subject of the inquiry or investigation.~~

2.

## Sec. B. Definitions

1. *Allegation* means any written or oral statement or other indication of possible research misconduct made to a University or HHS official where the alleged misconduct occurred within six years of the date the University received the allegation.
2. *Complainant* means a person who makes an allegation of research misconduct.
3. *Conflict of interest* means the real or apparent interference of one person's interests with the interests of another person, where potential bias may occur due to prior or existing personal or professional relationships.
4. *Deciding Official* means the University official who makes final determinations on allegations of research misconduct and any responsive institutional actions. The Deciding Official will not be the same individual as the Research Integrity Officer and should have no direct prior involvement in the institution's inquiry, investigation, or allegation assessment.
5. *Good-faith allegation* means an allegation made with the honest belief that research misconduct may have occurred. An allegation is not in good faith if it is made with knowing or reckless disregard for the information that would negate the allegation.
6. *Inquiry* means gathering information and initial fact-finding to determine whether an allegation or apparent instance of research misconduct warrants an investigation.

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7. *Investigation* means the formal examination and evaluation of all relevant facts to determine whether misconduct has occurred, and, if so, to determine the responsible person and the seriousness of the misconduct.
8. *ORI* means the Office of Research Integrity, the office within the U.S. Department of Health and Human Services (DHHS) that is responsible for the research misconduct and research integrity activities of the U.S. Public Health Service.
9. *PHS* means the U.S. Public Health Service, an operating component of the DHHS.
10. *PHS regulation* means the Public Health Service regulation establishing standards for institutional inquiries and investigations into allegations of research misconduct, which is set forth at 42 CFR Part 93, 'Public Health Service Policies on Research Misconduct.'
11. *PHS support* means PHS grants, contracts, or cooperative agreements or applications therefore.
12. *Research Integrity Officer* means the University official responsible for assessing allegations of research misconduct and determining whether such allegations warrant inquiries and for overseeing inquiries and investigations.
13. *Research record* means any data, document, computer file, computer diskette, or any other written or non-written account or object that reasonably may be expected to provide evidence or information regarding the proposed, conducted, or reported research that constitutes the subject of an allegation of research misconduct. A research record includes, but is not limited to, grant or contract applications, whether funded or unfunded; grant or contract progress and other reports; laboratory notebooks; notes; correspondence; videos; photographs; X-ray film; slides; biological materials; computer files and printouts; manuscripts and publications; equipment use logs; laboratory procurement records; animal facility records; human and animal subject protocols; consent forms; medical charts; and patient research files.



14. *Respondent* means the person against whom an allegation of research misconduct is directed or the person whose actions are the subject of the inquiry or investigation. There can be more than one respondent in any inquiry or investigation.
  
15. *Retaliation* means any action that adversely affects the employment or other institutional status of an individual that is taken by an institution or an employee because the individual has in good faith made an allegation of research misconduct or of inadequate institutional response thereto or has cooperated in good faith with an investigation of such allegation
  
16. *Research Misconduct* means fabrication, falsification, plagiarism in proposing, performing, or reviewing research, or in reporting research results. Fabrication is making up data or results and recording or reporting them. Falsification is manipulating research materials, equipment, or processes, or changing or omitting data or results such that the research is not accurately represented in the research record. Plagiarism is the appropriation of another person's ideas, processes, results or words without giving appropriate credit. Research misconduct does not include honest error or differences in opinion.

A finding of research misconduct requires that 1) there be a significant departure from accepted practices of the relevant research community, 2) the misconduct be committed intentionally, knowingly or recklessly; and 3) the allegation be proven by a preponderance of the evidence.

### Sec. C. Rights and Responsibilities

1. Research Integrity Officer (<https://research.case.edu/Compliance/ResearchIntegrity.cfm>)

The Research Integrity Officer will have primary responsibility for implementation of the procedures set forth in this document. The Research Integrity Officer will be a University official who is well qualified to handle the procedural requirements involved and is sensitive to the varied demands made on those who conduct research, those who are accused of misconduct, and those who report apparent misconduct in good faith.

The Research Integrity Officer will appoint the inquiry and investigation committees and shall take all reasonable steps to ensure an impartial and unbiased research misconduct

proceeding to the maximum extent practicable. He/she shall select those conducting the inquiry or investigation on the basis of scientific expertise that is pertinent to the matter and, prior to selection, shall screen them for any unresolved personal, professional, or financial conflicts of interest with the respondent, complainant, potential witnesses, or others involved in the matter. Any such conflict which a reasonable person would consider to demonstrate potential bias shall disqualify the individual from selection.

To the extent allowed by law, the Research Integrity Officer shall maintain the identity of respondents and complainants securely and confidentially and shall not disclose any identifying information, except to: (1) those who need to know in order to carry out a thorough, competent, objective and fair research misconduct proceeding; and (2) ORI as it conducts its review of the research misconduct proceeding and any subsequent proceedings.

To the extent allowed by law, any information obtained during the research misconduct proceeding that might identify the subjects of research shall be maintained securely and confidentially and shall not be disclosed, except to those who need to know in order to carry out the research misconduct proceeding.

The Research Integrity Officer will assist inquiry and investigation committees and all University personnel in complying with these procedures and with applicable standards imposed by government or external funding sources. The Research Integrity Officer is also responsible for maintaining files of all documents and evidence and for the confidentiality and the security of the files.

The Research Integrity Officer will report to ORI as required by regulation and keep ORI apprised of any developments during the course of the inquiry or investigation that may affect current or potential DHHS funding for the individual(s) under investigation or that PHS needs to know to ensure appropriate use of Federal funds and otherwise protect the public interest.

## 2. Complainant

The complainant will ordinarily have an opportunity to be interviewed by the inquiry and investigation committees, to review portions of the inquiry and investigation reports pertinent to his or her allegations or testimony, to be informed of the results of the inquiry and investigation, and to be protected from retaliation. Also, if the Research Integrity Officer has determined that the complainant may be able to provide pertinent information on any portions of the draft report; these portions may be given to the complainant for comment.

The complainant is responsible for making allegations in good faith, maintaining confidentiality, and cooperating with an inquiry or investigation.

### 3. Respondent

The respondent will be informed in writing of the allegations when an inquiry is opened and notified in writing of the final determinations and resulting actions. The respondent will also have the opportunity to be interviewed by and present evidence to the inquiry and investigation committees, to review the draft inquiry and investigation reports, and to have the advisor of choice. Advisors, however, may only consult with the respondent. They may not address the committee, ask questions of the committee, or participate in the interviews.

The respondent is responsible for maintaining confidentiality and cooperating with the conduct of an inquiry or investigation. If the respondent is not found to have engaged in research misconduct, he or she has the right to receive institutional assistance in restoring his or her reputation.

### 4. Deciding Official

The associate vice president for research (or in his or her absence, a representative appointed by the provost) as the deciding official will receive the inquiry and/or investigation report and any written comments made by the respondent or the complainant on the draft report. The deciding official will consult with the research integrity officer and other appropriate officials and will determine whether to conduct an investigation, whether misconduct occurred, whether to impose sanctions, or whether to recommend and/or take other appropriate administrative actions.

## Sec. D. General Policies and Principles

### 1. Responsibility to Report Misconduct

All employees or individuals associated with Case Western Reserve University should report observed, suspected, or apparent misconduct in research to the Research Integrity Officer. If an individual is unsure whether a suspected incident falls within the definition of research misconduct, he or she may contact the Research Integrity Officer to discuss the suspected misconduct informally. If the circumstances described by the individual do not meet the definition of research misconduct, the Research Integrity Officer will refer the individual or allegation to other offices or officials with responsibility for resolving the problem.

At any time, an employee may have discussions and consultations about concerns of possible misconduct with the Research Integrity Officer and will be counseled about appropriate procedures for reporting allegations.

## 2. Protecting the Complainant

The Research Integrity Officer will monitor the treatment of individuals who bring allegations of misconduct or of inadequate institutional response thereto, and those who cooperate in inquiries or investigations. The Research Integrity Officer will attempt to ensure that these persons will not be retaliated against in the terms and conditions of their employment or other status at the institution and will review instances of alleged retaliation for appropriate action.

Employees or those affiliated with the University or a PHS grant should immediately report any alleged or apparent retaliation to the Research Integrity Officer.

Also the University will protect the privacy of those who report misconduct in good faith to the maximum extent possible. For example, if the complainant requests anonymity, the University will make a reasonable effort to honor the request during the allegation assessment or inquiry within applicable policies and regulations and state and local laws, if any. The complainant will be advised that if the matter is referred to an investigation committee and the complainant's testimony is required, anonymity may no longer be guaranteed. The University is required to undertake diligent efforts to protect the positions and reputations of those persons who, in good faith, make allegations.

## 3. Protecting the Respondent

Inquiries and investigations will be conducted in a manner that will ensure fair treatment to the respondent(s) and confidentiality to the extent possible without compromising public health and safety or thoroughly carrying out the inquiry or investigation.

University employees accused of research misconduct may consult with an advisor (who is not a principal or witness in the case) to seek advice and may bring the advisor to interviews or meetings on the case. However, the advisor may only consult with the respondent. Advisors may not address the committee, ask questions of the committee, or participate in the interview.

## 4. Cooperation with Inquiries and Investigations

University employees and those working on PHS grants will cooperate with the Research

Integrity Officer and other institutional officials in the review of allegations and the conduct of inquiries and investigations. Employees have an obligation to provide relevant evidence to the Research Integrity Officer or other University officials on misconduct allegations.

#### 5. Preliminary Assessment of Allegations

Promptly after receiving an allegation of research misconduct, defined as a disclosure of possible research misconduct through any means of communication, the Research Integrity Officer shall assess the allegation to determine if: (1) it meets the definition of research misconduct in 42 CFR Section 93.103; (2) it involves either the PHS supported research, applications for PHS research support, or research records specified in 42 CFR Section 93.102(b) or other non-PHS support; and, (3) the allegation is sufficiently credible and specific so that potential evidence of research misconduct may be identified. This assessment will be presented in writing to the Deciding Official for concurrence before the Research Integrity Officer either closes the matter or proceeds to inquiry. All parties will be notified in writing if the matter is closed after the preliminary assessment.

### Sec. E. Conducting the Inquiry

#### 1. Initiation and Purpose of the Inquiry

Following the preliminary assessment, if the Research Integrity Officer determines that the allegation provides sufficient information to allow specific follow-up and falls under the PHS definition of research misconduct, he or she will initiate the inquiry process whether it involves PHS support or not. In initiating the inquiry, the Research Integrity Officer should identify clearly the original allegation and any related issues that should be evaluated. The purpose of the inquiry is to make a preliminary evaluation of the available evidence and testimony of the respondent, complainant, and key witnesses to determine whether there is sufficient evidence of possible research misconduct to warrant an investigation. The purpose of the inquiry is not to reach a final conclusion about whether misconduct definitely occurred or who was responsible. The findings of the inquiry will be set forth in an inquiry report.

#### 2. Sequestration of the Research Records

After determining that an allegation falls within the definition of misconduct in research, the Research Integrity Officer must ensure that all original research records and materials

relevant to the allegation are secured. The Research Integrity Officer may consult with ORI for advice and assistance in this regard.

The Research Integrity Officer shall take the following specific steps to obtain, secure, and maintain the research records and evidence pertinent to the research misconduct proceeding:

1. **Either before or when the Research Integrity Officer notifies the respondent of the allegation**, the Research Integrity Officer shall promptly take all reasonable and practical steps to obtain custody of all research records and evidence needed to conduct the research misconduct proceeding, inventory those materials, and sequester them in a secure manner, except in those cases where the research records or evidence encompass scientific instruments shared by a number of users, custody may be limited to copies of the data or evidence on such instruments, so long as those copies are substantially equivalent to the evidentiary value of the instruments.
  2. Where appropriate, give the respondent copies of, or as reasonable, supervised access to the research records.
  3. Undertake all reasonable and practical efforts to take custody of additional research records and evidence discovered during the course of the research misconduct proceeding, including at the inquiry and investigation stages, or if new allegations arise, subject to the exception for scientific instruments in (1) above.
3. Appointment of the Inquiry Committee

The Research Integrity Officer, in consultation with other University officials as appropriate, will appoint an inquiry committee and committee chair. The inquiry committee should consist of individuals who do not have real or apparent conflicts of interest in the case, are unbiased, and have the necessary expertise to evaluate the evidence and issues related to the allegation, interview the principals and key witnesses, and conduct the inquiry. These individuals may be scientists, subject matter experts, administrators, lawyers, or other qualified persons, and they may be from inside or outside the University.

The Research Integrity Officer will notify the respondent of the proposed committee

membership in writing. If the respondent submits a written objection to any appointed member of the inquiry committee or expert based on bias or conflict of interest within 5 days, the Research Integrity Officer will determine whether to replace the challenged member or expert with a qualified substitute.

#### 4. Charge to the Committee and the First Meeting

The Research Integrity Officer will prepare a charge for the inquiry committee that describes the allegations and any related issues identified during the allegation assessment and states that the purpose of the inquiry is to make a preliminary evaluation of the evidence and testimony of the respondent, complainant, and key witnesses to determine whether there is sufficient evidence of possible research misconduct to warrant an investigation as required by the PHS regulation. The purpose is not to determine whether research misconduct definitely occurred or who was responsible.

At the committee's first meeting, the Research Integrity Officer will review the charge with the committee, discuss the allegations, any related issues, and the appropriate procedures for conducting the inquiry, assist the committee with organizing plans for the inquiry, and answer any questions raised by the committee. The Research Integrity Officer and the Office of General Counsel will be available throughout the inquiry to advise the committee as needed.

#### 5. Inquiry Process

The inquiry committee will normally interview the complainant, the respondent and key witnesses as well as review relevant research records and materials. Then the inquiry committee will evaluate the evidence and testimony obtained during the inquiry. After consultation with the Research Integrity Officer and the Office of General Counsel, the committee members will decide whether there is sufficient evidence of possible research misconduct to recommend further investigation. The scope of the inquiry does not include deciding whether misconduct occurred or conducting exhaustive interviews and analyses.

### Sec. F. The Inquiry Report

#### 1. Elements of the Inquiry Report

The written inquiry report shall contain the following information: (1) The name and

position of the respondent(s); (2) A description of the allegations of research misconduct; (3) The PHS support involved, including, for example, grant numbers, grant applications, contracts, and publications listing PHS support or other non-PHS support; (4) The basis for recommending that the alleged actions warrant an investigation; and (5) Any comments on the report by the respondent or the complainant. The report should also include recommendations on whether any other actions should be taken if an investigation is not recommended. The Office of General Counsel will review the report for legal sufficiency.

## 2. Comments on the Report by the Respondent and the Complainant

The Research Integrity Officer will provide the respondent with a copy of the inquiry report for comment and rebuttal, along with a copy of this policy. The Research Integrity Officer may provide the complainant, if he or she is identifiable; with a summary of the inquiry findings that addresses the complainant's role and opinions in the investigation.

### a. Confidentiality

The Research Integrity Officer may establish reasonable conditions for review to protect the confidentiality of the report.

### b. Receipt of Comments

Within ~~44~~10 calendar days of receipt of the report or summary, the respondent (and complainant, if applicable) will provide their comments, if any, to the inquiry committee. Any comments that the complainant or respondent submits on the report may become part of the final inquiry report and record. Based on the comments, the inquiry committee may revise the report as appropriate.

## 3. Inquiry Decision and Notification

### a. Decision by Deciding Official

The Research Integrity Officer will transmit the final report and any comments to the Deciding Official, who will make the determination of whether findings from the inquiry provide sufficient evidence of possible research misconduct to justify



conducting an investigation. The inquiry is completed when the Deciding Official makes this determination. The determination is ordinarily made within 60 days of the first meeting of the inquiry committee, unless circumstances warrant a longer period. The reasons for exceeding the 60-day period shall be documented in the inquiry record.

b. Notification

The Research Integrity Officer will ordinarily notify both the respondent and the complainant in writing of the Deciding Official's decision of whether to proceed to an investigation and will remind them of their obligation to cooperate in the event an investigation is opened. The Research Integrity Officer will also notify all appropriate University officials of the Deciding Official's decision.

4. Time Limit for Completing the Inquiry Report

The inquiry committee will normally complete the inquiry and submit its report in writing to the Research Integrity Officer no more than 60 calendar days following its first meeting, unless the Research Integrity Officer approves an extension because circumstances warrant a longer period. If the Research Integrity Officer approves an extension, the reason for the extension will be entered into the records. The respondent also may be notified of the extension.

On or before the date on which the investigation begins (the investigation must begin within 30 calendar days of the institution finding that an investigation is warranted), the Research Integrity Officer shall provide ORI with the written finding by and a copy of the inquiry report containing the information required by 42 CFR Section 93.309(a). Upon a request from ORI he/she shall promptly send them: (1) a copy of institutional policies and procedures under which the inquiry was conducted; (2) the research records and evidence reviewed, transcripts or recordings of any interviews, and copies of all relevant documents; and (3) the charges for the investigation to consider. Inquiry reports of allegations that do not involve PHS support in accordance with the definition of research misconduct will not be forwarded to ORI, but will otherwise be in accordance with this policy.

Sec. G. Conducting the Investigation

### 1. Purpose of the Investigation

The purpose of the investigation is to explore in detail the allegations, to examine the evidence in depth, and to determine specifically whether misconduct has been committed, by whom, and to what extent. The investigation will also determine whether there are additional instances of possible misconduct that would justify broadening the scope beyond the initial allegations. This is particularly important where the alleged misconduct involves clinical trials or potential harm to human subjects or the general public or if it affects research that forms the basis for public policy, clinical practice, or public health practice. The findings of the investigation will be set forth in an investigation report.

### 2. Sequestration of the Research Records

The Research Integrity Officer will immediately sequester any additional pertinent research records that were not previously sequestered during the inquiry. This sequestration should occur before or at the time the respondent is notified that an investigation has begun. The need for additional sequestration of records may occur for any number of reasons, including the University's decision to investigate additional allegations not considered during the inquiry stage or the identification of records during the inquiry process that had not been previously secured. The procedures to be followed for sequestration during the investigation are the same procedures that apply during the inquiry.

### 3. Appointment of the Investigation Committee

The Research Integrity Officer, in consultation with other University officials as appropriate, will appoint an investigation committee and the committee chair as soon as practicable after the respondent has been notified that an investigation is planned. The investigation committee should consist of at least three individuals who do not have real or apparent conflicts of interest in the case, are unbiased, and have the necessary expertise to evaluate the evidence and issues related to the allegations, interview the principals and key witnesses, and conduct the investigation. These individuals may be scientists, administrators, subject matter experts, lawyers, or other qualified persons, and they may be from inside or outside the University. Individuals appointed to the investigation committee may also have served on the inquiry committee.

The Research Integrity Officer will notify the respondent of the proposed committee membership. If the respondent submits a written objection to any appointed member of the investigation committee, the Research Integrity Officer will determine whether to replace the challenged member with a qualified substitute.

#### 4. Charge to the Committee and the First Meeting

##### a. Charge to the Committee

The Research Integrity Officer will define the subject matter of the investigation in a written charge to the committee that describes the allegations and related issues identified during the inquiry, defines research misconduct, and identifies the name of the respondent. The charge will state that the committee is to evaluate the evidence and testimony of the respondent, complainant, and key witnesses to determine whether, based on a preponderance of the evidence, research misconduct occurred and, if so, to what extent, who was responsible, and its seriousness.

During the investigation, if additional information becomes available that substantially changes the subject matter of the investigation or would suggest additional respondents, the committee will notify the Research Integrity Officer, who will determine whether it is necessary to notify the respondent of the new subject matter or to provide notice to additional respondents.

##### b. The First Meeting

The Research Integrity Officer, with the Office of General Counsel, will convene the first meeting of the investigation committee to review the charge, the inquiry report, and the prescribed procedures and standards for the conduct of the investigation, including the necessity for confidentiality and for developing a specific investigation plan. The investigation committee will be provided with a copy of these instructions and, where PHS funding is involved, the PHS regulation.

#### 5. Investigation Process

In conducting all investigations, the University shall: (1) Use diligent efforts to ensure that the investigation is thorough and sufficiently documented and includes examination of all research records and evidence relevant to reaching a decision on the merits of the allegations; (2) Interview each respondent, complainant, and any other available person who has been reasonably identified as having information regarding any relevant aspects of the investigation, including witnesses identified by the respondent, and record or transcribe each interview, provide the recording or transcript to the interviewee for correction, and include the recording or transcript in the record of investigation; (3) Pursue diligently all significant issues and leads discovered that are determined relevant

to the investigation, including any evidence of additional instances of possible research misconduct, and continue the investigation to completion; and (4) Otherwise comply with the requirements for conducting an investigation in 42 CFR Section 93.310.

The respondent will be notified sufficiently in advance of the scheduling his or her interview so that the respondent may prepare for the interview and arrange for the attendance of an advisor, if the respondent wishes.

## Sec. H. The Investigation Report

### 1. Elements of the Investigation Report

The Research Integrity Officer, in conjunction with the Investigation Committee, shall prepare the draft and final institutional investigation reports in writing and provide the draft report for comment as provided elsewhere in these policies and procedures and 42 CFR Section 93.312. The final investigation report shall:

1. Describe the nature of the allegations of research misconduct;
2. Describe and document the PHS support (if applicable), including, for example any grant numbers, grant applications, contracts, and publications listing PHS support;
3. Describe the specific allegations of research misconduct considered in the investigation and the charge to the Investigation Committee;
4. Include the institutional policies and procedures under which the investigation was conducted, if not already provided to ORI;
5. Identify and summarize the research records and evidence reviewed, and identify any evidence taken into custody, but not reviewed. **The report should also**

**describe any relevant records and evidence not taken into custody and explain why.**

6. Provide a finding as to whether research misconduct did or did not occur for each separate allegation of research misconduct identified during the investigation, and if misconduct was found,

(i) identify it as falsification, fabrication, or plagiarism;

(ii) ~~identify~~ identify the criteria for determining that it was a significant departure from accepted practices, that it was committed whether it was intentionally, knowingly, or in reckless disregard, and that it was proven by a preponderance of the evidence ;

(iii) summarize the facts and the analysis supporting the conclusion and consider the merits of any reasonable explanation by the respondent and any evidence that rebuts the respondent's explanations,

(iii) identify the specific PHS support or other support;

(iv) identify any publications that need correction or retraction;

(v) identify the person(s) responsible for the misconduct, and

(vi) list any current support or known applications or proposals for support that the respondent(s) has pending with non-PHS Federal agencies; and

7. Include and consider any comments made by the respondent and complainant on the draft investigation report.

The University shall maintain and provide to ORI upon request all relevant research records and records of its research misconduct proceeding, including results of all interviews and the transcripts or recordings of such interviews.

2. Comments on the Draft Report

a. Respondent

The Research Integrity Officer will provide the respondent with a copy of the draft investigation report, and concurrently, a copy of, or supervised access to, the evidence on which the report is based and notify the respondent that any comments must be submitted within ~~30~~14 days of the date on which he/she received the draft report. The respondent's comments will be attached to the final report and are considered in the final investigation report.

b. Complainant

The Research Integrity Officer will provide the complainant; if he or she is identifiable, with those portions of the draft investigation report that address the complainant's role and opinions in the investigation. The report may be modified, as appropriate, based on the complainant's comments.

c. Review by Office of General Counsel

The draft investigation report will be transmitted to the Office of General Counsel for a review of its legal sufficiency. Comments should be incorporated into the report as appropriate.

d. Confidentiality

In distributing the draft report, or portions thereof, to the respondent and complainant, the Research Integrity Officer will inform the recipient of the confidentiality under which the draft report is made available and may establish reasonable conditions to ensure such confidentiality. For example, the Research Integrity Officer may request the recipient to sign a confidentiality statement or to come to his or her office to review the report.

### University Review and Decision

Based on a preponderance of the evidence, the Deciding Official will make the final determination whether to accept the investigation report, its findings, and the recommended University actions. A preponderance of the evidence means proof by information that, compared with that opposing it, leads to the conclusion that the fact at issue is more probably true than not. If this determination varies from that of the investigation committee, the Deciding Official will

explain in detail the basis for rendering a decision different from that of the investigation committee in the institution's letter transmitting the report to ORI. The Deciding Official's explanation should be consistent with the PHS definition of research misconduct, the University's policies and procedures, and the evidence reviewed and analyzed by the investigation committee. The Deciding Official may also return the report to the investigation committee with a request for further fact-finding or analysis. The Deciding Official's determination, together with the investigation committee's report, constitutes the final investigation report for purposes of ORI review.

When a final decision on the case has been reached, the Research Integrity Officer will notify both the respondent and the complainant in writing of the decision. In addition, the Deciding Official will determine whether law enforcement agencies, professional societies, professional licensing boards, editors of journals in which falsified reports may have been published, collaborators of the respondent in the work, or other relevant parties should be notified of the outcome of the case. The Research Integrity Officer is responsible for ensuring compliance with all notification requirements of funding or sponsoring agencies.

#### Transmittal of the Final Investigation Report

After comments have been received and the necessary changes have been made to the draft report, the investigation committee should transmit the final report with attachments, including the respondent's and complainant's comments, to the Deciding Official, through the Research Integrity Officer.

#### Time Limit for Completing the Investigation Report

An investigation should ordinarily be completed within 120 days of its initiation, with the initiation ordinarily beginning with the first meeting of the investigation committee. This includes conducting the investigation, preparing the report of findings, making the draft report available to the subject of the investigation for comment, submitting the report to the Deciding Official for approval, and submitting the report to the ORI. If the University will not be able to complete the investigation in 120 days, it will submit to ORI a written request for an extension and an explanation for the need for an extension.

#### Sec. I. Requirements for Reporting to ORI

1. The University shall promptly provide to ORI after the investigation: (1) A copy of the investigation report as outlined in Section H-1 above; and all attachments, ~~and any~~

appeals; (2) A statement of whether the institution found research misconduct and, if so, who committed it; (3) A statement of whether the institution accepts the findings in the investigation report; and (4) A description of any pending or completed administrative actions against the respondent. *(Only actions involving respondents who receive funding from PHS will be reported to ORI.)*

2. If the University plans to terminate an inquiry or investigation for any reason without completing all relevant requirements of the PHS regulation, the Research Integrity Officer will submit a report of the planned termination to ORI, including a description of the reasons for the proposed termination.
3. If the University determines that it will not be able to complete the investigation in 120 days, the Research Integrity Officer will submit to ORI a written request for an extension that explains the delay, reports on the progress to date, estimates the date of completion of the report, and describes other necessary steps to be taken. If the request is granted, the Research Integrity Officer will file periodic progress reports as requested by the ORI.
4. When the case involves PHS funds, the University cannot accept an admission of research misconduct as a basis for closing a case or not undertaking an investigation without prior approval from ORI.
5. At any time during a research misconduct proceeding, the University shall notify ORI immediately if it has reason to believe that any of the following conditions exist:
  1. Health or safety of the public is at risk, including an immediate need to protect human or animal subjects.
  2. HHS resources or interests are threatened.
  3. Research activities should be suspended.



4. There is a reasonable indication of violations of civil or criminal law.
5. Federal action is required to protect the interests of those involved in the research misconduct proceeding.
6. The University believes the research misconduct proceeding may be made public prematurely, so that HHS may take appropriate steps to safeguard evidence and protect the rights of those involved.
7. The University believes the research community or public should be informed.

#### Sec. J. Institutional Administrative Actions

The University will cooperate with and assist ORI and HHS, as needed, to carry out any administrative actions HHS may impose as a result of a final finding of research misconduct by HHS.

The University will also take appropriate administrative actions against individuals when an allegation of misconduct has been substantiated.

If the Deciding Official determines that the alleged misconduct is substantiated by the findings, he or she will decide on the appropriate actions to be taken, after consultation with the Research Integrity Officer. The actions may include:

- withdrawal or correction of all pending or published abstracts and papers emanating from the research where research misconduct was found.

- removal of the responsible person from the particular project, letter of reprimand, special monitoring of future work, probation, suspension, salary reduction, or initiation of steps leading to possible rank reduction or termination of employment;
- restitution of funds as appropriate.

The University will report to ORI any proposed settlements, admissions of research misconduct, or institutional findings of misconduct that arise at any stage of a misconduct proceeding, including the allegation and inquiry stages.

#### Sec. K. Other Considerations

##### 1. Termination of University Employment or Resignation Prior to Completing Inquiry or Investigation

The termination of the respondent's employment with the University, by resignation or otherwise, before or after an allegation of possible research misconduct has been reported, ordinarily will not preclude or terminate the misconduct procedures.

If the respondent, without admitting to the misconduct, elects to resign his or her position prior to the initiation of an inquiry, but after an allegation has been reported, or during an inquiry or investigation, the inquiry or investigation ordinarily will proceed. If the respondent refuses to participate in the process after resignation, the committee will use its best efforts to reach a conclusion concerning the allegations, noting in its report the respondent's failure to cooperate and its effect on the committee's review of all the evidence.

##### 2. Restoration of the Respondent's Reputation

If the University finds no misconduct or that the allegation of misconduct cannot be substantiated and ORI concurs, after consulting with the respondent, the Research Integrity Officer will undertake reasonable efforts to restore the respondent's reputation. Depending on the particular circumstances, the Research Integrity Officer should consider notifying those individuals aware of or involved in the investigation of the final outcome, publicizing the final outcome in forums in which the allegation of research misconduct was previously publicized, or expunging all reference to the research misconduct allegation from the respondent's personnel file.

### 3. Protection of the Complainant and Others

Regardless of whether the University or ORI determines that research misconduct occurred, the Research Integrity Officer will undertake reasonable efforts to protect complainants who made allegations of research misconduct in good faith and others who cooperate in good faith with inquiries and investigations of such allegations. Upon completion of an investigation, the Research Integrity Officer will determine, after consulting with the complainant, what steps, if any, are needed to protect or restore the position or reputation of the complainant. The Research Integrity Officer will also take appropriate steps during the inquiry and investigation to prevent any retaliation against the complainant.

### 4. Allegations Not Made in Good Faith

If relevant, the Inquiry or Investigation Committee will determine whether the complainant's allegations of research misconduct were not made in good faith and will include such determination in its respective report. If an allegation was not made in good faith, the Deciding Official will determine whether any administrative action should be taken against the complainant.

### 5. Interim Administrative Actions

At any time during a research misconduct proceeding, the University shall take appropriate interim actions to protect public health, federal funds and equipment, and the integrity of the PHS supported research process. The necessary actions will vary according to the circumstances of each case, but examples of actions that may be necessary include delaying the publication of research results, providing for closer supervision of one or more researchers, requiring approvals for actions relating to the research that did not previously require approval, auditing pertinent records, or taking steps to contact other institutions that may be affected by an allegation of research misconduct.

## Sec. L. Record Retention

After completion of a case and all ensuing related actions, the Research Integrity Officer will prepare a complete file, including the records of any inquiry or investigation and copies of all documents and other materials furnished to the Research Integrity Officer or committees.

The University shall cooperate fully and on a continuing basis with ORI during its oversight reviews of this institution and its research misconduct proceedings and during the process under which the respondent may contest ORI findings of research misconduct and proposed HHS administrative actions. This includes providing, as necessary to develop a complete record of relevant evidence, all witnesses, research records, and other evidence under the University's control or custody, or in the possession of, or accessible to, all persons that are subject to the University's authority.

The University shall maintain all records of the research misconduct proceeding, as defined in 42 CFR Section 93.317(a), for 7 years after completion of the proceeding, or any ORI or HHS proceeding under Subparts D and E of 42 CFR Part 93, whichever is later, unless the University has transferred custody of the records and evidence to HHS, or ORI has advised the University that it no longer need to retain the records.

*\*approved by the Faculty Senate 12/19/05 and the Board of Trustees 2/25/06; red text approved by the Faculty Senate 4/21/11; pending BOT approval.*

# Course Evaluation Implementation

Executive Committee

September 8, 2014

# Committee Members

- Robin Dubin, chair (*senate chair, 2012-2013*)
- Gary Chottiner (*past senate & FSCUE chair*)
- Mark DeGuire (*FSCUE chair, 2013-2014*)
- Don Feke (*Vice Provost for UG Education*)
- Raymond Muzic (*chair of senate ICT committee*)
- Colleen Nagy (*ITS Senior Director*)

GUEST: Paul Jarc (*ITS Applications Developer, creator of current course evaluation system*)

# Purpose of Course Evaluations

*(approved by the Senate two years ago)*

- Primary purpose: improvement of instruction
- Secondary purposes:
  - Input into salary, promotion and tenure decisions
  - Student course selection

# Key Elements of FSCUE Recommendation

*(approved by Faculty Senate last year)*

- New instrument: 3 questions + open-ended responses for each.
- Option for students to opt out & end reminders.
- Ability to add questions at a course, department or school level.
- Evaluation form available on smartphones & tablets in appropriate formats.
- Department chairs + others responsible for courses can view written comments.
- Extended time (*until due date for grades*) to complete evaluations.
- Release of course grades delayed until individuals complete each evaluation.
- Improved reporting and data trustworthiness tools.
- Voluntary mid-term evaluations



# Charge

- Determine procedures for implementation of new undergraduate course evaluation forms.
- Resolve issues that have been raised about implementation.
- Implement new undergraduate course evaluation forms in the fall of 2014.

# Factors Considered in Making Our Recommendations

- Goal: provide as many elements of the FSCUE recommendation as possible in the first go round.
- Cost to the University
- System attributes
- Textual Analysis

# Recommendations

1. Pilot EvaluationKIT this fall
2. Keep evaluations open until the end of *final exams*
3. Permit faculty (and others, as appropriate) to add questions from a question library
4. Add textual analysis in the future
5. Address validity issues in the future

# Vendor vs. Our System

	Modify Our System	EvauationKIT
Up-front costs	54.5K	2K
On-going	5K	19.7K + 3K



Site license  
cost

## Notes:

- Our system is more expensive to set up, but cheaper to administer.
- The expectation is that EvaluationKIT will be continuously improving its product. We do not believe that will happen for our system.

# 1. Pilot EvaluationKIT this fall

- Pros

- Pilot is free for one semester
- Entire university could be served
  - SOM currently spending 8K/yr on different system
- Includes platform mobility
- Midterm evaluations included

- Cons

- Cost: after first semester, cost is 20K per year

## 2. Keep evaluations open until the end of final exams

- Compromise with FSCUE recommendation
- Tying student grade viewing to evaluation completion is not feasible for fall and will be costly and complicated to implement
- Faculty can prevent students from seeing grades before completing evaluations, if desired, by not publishing grades until after evaluations close.

### 3. Permit faculty to add questions from a question library

- The library will initially consist of
  - sensible questions from old evaluation
  - recommendations of 2008 committee
- The Senate will need to decide how questions can be added to this set.

# 4. and 5. Future Issues

- Add textual analysis in the future
  - Because there are three open ended questions much information will be inaccessible unless this tool is available
- Address validity issues in the future
  - Data from EvaluationKIT can be downloaded to the university for further analysis
  - May not be necessary if participation rates go up



# Key Elements of FSCUE Recommendation

*(approved by Faculty Senate last year)*

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- Ability to add questions at a course, department or school level.
- Evaluation form available on smartphones & tablets in appropriate formats.
- Department chairs + others responsible for courses can view written comments.
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- Extended time (*until due date for grades*) to complete evaluations.
- Improved reporting and data trustworthiness tools.

## Key

- Satisfied by recommendations
- Not satisfied
- To be done in the future or compromise

# Other Issues for Senate

- Can Graduate classes be evaluated with the new instrument?
  - Cross listed grad/ugrad classes
- Who will work with ITS to implement the new system?
  - We recommend the Provost's office
- If our recommendations are adopted, who will make the decision in January to continue with EvaluationKIT or modify our own system?
- The course evaluation system needs to be monitored on an on-going basis, so that changes can be made as needed. Who will do this?
  - We recommend FSCUE(/FSCGS)



# Tobacco Free Campus Initiative Update

9/8/14

Elizabeth Click

# Discussion Topics

- Policy Draft Review & Endorsement – Faculty, Staff, Students
- Task Force Proposal
- Implementation Plan Steps
  - Co-Chairs
  - Subcommittees
    - Facilities, Boundaries, Signage; Compliance, Enforcement & Safety
    - Marketing & Communications
    - Tobacco Addiction, Treatment & Prevention
  - Proposed Timeline

re Anti-science Ohio House Bill 597

**In a nutshell:**

see <http://www.dispatch.com/content/stories/local/2014/08/20/intelligent-design-rises-again.html> "Rep. Andy Thompson, R-Marietta, a main bill sponsor, said ...'we want to provide them the flexibility to consider all perspectives, not just on matters of faith or how the Earth came into existence, but also global warming and other topics that are controversial,' Thompson said. Asked if intelligent design — the idea that a higher authority is responsible for life — should be taught alongside evolution, Thompson said, 'I think it would be good for them to consider the perspectives of people of faith. That's legitimate.'"

**Important background on this complex issue:**

1925-1968: Laws in effect in over a dozen states make it illegal to teach evolution in public schools

1968-present: US Supreme Court & federal district courts repeatedly find anti-evolution laws unconstitutional:

SCOTUS 1968: "the state has no legitimate interest in protecting any or all religions from views distasteful to them;" SCOTUS 1987 finding calls Creation Science "a sham." Creationists start recycling creationist material under more secular-sounding labels like "Intelligent Design," which a district court finds to be "a mere relabeling" of creation science. For an excellent and highly readable overview of the legal issues, read the judge's decision in 2005 case *Kitzmiller vs*

Dover, [http://ncse.com/files/pub/legal/kitzmiller/highlights/2005-12-20\\_Kitzmiller\\_decision.pdf](http://ncse.com/files/pub/legal/kitzmiller/highlights/2005-12-20_Kitzmiller_decision.pdf)

2001-2006- Having at the time no mention of evolution in its science standards & having received a grade of "F" in science from the Fordham Foundation, Ohio begins writing its own science standards & model lesson plans for instruction. The Ohio Board of Education (OBE) attempts to require the teaching of intelligent-design creationism (ID). See <http://ncse.com/creationism/general/evolutionary-wars-ohio> CWRU holds a public forum in Feb 2002, over 3000 people show up. The following week the creationists backpedal & ask the state board of education to not require ID but to "allow" teachers to "teach the controversy" over creation vs evolution using "critical analysis of evolution." The creationists claim there are many Ohio scientists who use ID in their scientific work. To test this hypothesis CWRU commissioned & helped develop a poll of scientists in Ohio (all profs in Ohio universities & colleges' science departments including physicists, chemists, biologists, etc, and including both mainstream colleges & universities and also fundamentalist Christian schools such as Cedarville). Fully one third of the profs responded to the poll & the overwhelming majority said evolution should be taught, intelligent-design should not & that they did not use ID in their research. 84% said they do not see anything that prevents a person from both accepting evolution and believing in God. <http://ncse.com/creationism/general/ohio-scientists-intelligent-design-poll> In 2004, 5 model lesson plans were introduced that included assertions that e.g. the sun &

earth were only 6k years old and various other creationist ideas. The OBE quickly backed off 4 of them but a long effort by Ohio scientists was needed to get the OBE to abandon the ID creationist "Critical 'Analysis' of Evolution" lesson plan (which consisted entirely of recycled "creation science"/"intelligent design" material). Along the way the effort uncovered extremely convincing evidence of illegal religious motivation on the part of the thought leaders on the OBE (via FOIA requests). When the evidence was reported in the press, Governor Taft finally made public statements against the OBE's illegal efforts to use the power of the government to impose religious views on students via the standards & lesson plan. The lesson plan & the standards language it served were deleted from the standards/curriculum in Feb 2006. However, within a few months the OBE proposed a "Controversial Issues Template." A final push by Ohio scientists succeeded in preventing adoption of that in Nov 2006.

<http://ncse.com/rncse/26/4/critical-analysis-ohio> There followed 8 years in which the OBE did not try to insert creationist content into the standards & curriculum. However a court case arose over a teacher who used the standards language as justification to teach creationism in the Mount Vernon schools. His case eventually was heard by the Ohio Supreme Court, which ruled against him.

### **The current issue:**

The "controversial issues template" had already broadened the explicit focus to promote attacks on evolution, climate science, cloning and stem cell research.

The current attack on science in Ohio extends along that trajectory.

This time, though, it is the legislature itself attempting to adopt anti-science legislation by replacing the "Common Core" standards with an idiosyncratic scheme that initially included minimizing non-American/British authors in literature courses and still includes a major attacks on science teaching that demands students be given knowledge/facts but not taught about the methods & processes by which science works.

(Note: -the Common Core is a project developed by the governors of many states working "together" (<http://www.corestandards.org>) with funding from Bill Gates. It has become the focus of Tea Party derision -see <http://cincinnatiteaparty.org/we-now-have-a-smart-exit-strategy-from-common-core/>. It has huge numbers of vocal supporters and detractors, including many who are both simultaneously (see MLA address Jan 2014 <http://www.washingtonpost.com/blogs/answer-sheet/wp/2014/01/18/everything-you-need-to-know-about-common-core-ravitch/> -"It is good to have standards. I believe in standards...I do not mean to dismiss the Common Core standards altogether. [but] They could be far better"). See <http://edexcellence.net/articles/whats-behind-the-declining-support-for-the-common-core-0> and this fairly even-handed article: <http://www.washingtontimes.com/news/2014/sep/1/restarting-the-common-core-debate/> (Note, this is the right-wing "Moonie" Unification Church-owned Wash Times, not the Post))

Our concern about the anti-science legislation need not engage with the larger debate over whether common core is a good thing or not. The plain situation is that there is a bill on the table to replace the common core (which has good science content) with an attack on teaching science. If the Ohio legislature does overturn adoption of the Common Core, it must not happen via the current language of the bill. (see yesterday's PD article: "The alternate education standards that **Common Core** opponents want for Ohio have a few other twists beyond **opening the door for creationism in the classroom.**")

The bill says: "*The standards in science shall ...focus on academic and scientific knowledge rather than scientific processes; and prohibit political or religious interpretation of scientific facts in favor of another.*"

Yes, it's ungrammatical. But the bill's lead sponsor has clarified what it means: "Thompson said that clause prevents teachers and schools from only presenting one side of a political and scientific debate -- global warming, for example -- without also presenting the other side. And he said the bill gives districts and teachers the freedom to teach religious interpretations of scientific issues as they deem best. That allows "**intelligent design**" and **creationism to be taught alongside evolution**, as well as varying views on the age of the earth and whether dinosaurs and people existed at the same time. 'It gives some flexibility to districts to pursue what they think is most appropriate to their students,' Thompson said. 'We want to have the ability to share perspectives that differ. Teaching one thing to the exclusion of anything else limits the discussion.' Asked if the law would require intelligent design to be taught as equivalent to evolution, Thompson said: 'I don't know that it needs to be treated on par, but districts will be able to choose based on their judgment.' Thompson said faith involves belief even when evidence cannot prove something. Asked if faith-based beliefs belong in a science class, he said he is not seeking to require that any beliefs make up a given percentage of a class.

[http://www.cleveland.com/metro/index.ssf/2014/08/common\\_core\\_opposition\\_bill\\_wont\\_limit\\_foreign\\_authors\\_-\\_or\\_teaching\\_of\\_creationism\\_and\\_intelligent\\_design.html](http://www.cleveland.com/metro/index.ssf/2014/08/common_core_opposition_bill_wont_limit_foreign_authors_-_or_teaching_of_creationism_and_intelligent_design.html)

See also Columbus Dispatch: "In what could reignite a controversy that raged about eight years ago, a bill to repeal Common Core education standards in Ohio would allow intelligent design and creationism to be taught alongside evolution in science classes. House Bill 597 says new state science standards must "prohibit political or religious interpretation of scientific facts in favor of another." Rep. Andy Thompson, R-Marietta, a main bill sponsor, said the goal is not to mandate what must be taught but provide options for districts. "In many districts, they may have a different perspective on that, and we want to provide them the flexibility to consider all perspectives, not just on matters of faith or how the Earth came into existence, but also global warming and other topics that are controversial," Thompson said. Asked if intelligent design — the idea that a higher authority is responsible for life — should be taught alongside evolution, Thompson said, "I think it would be good for them to consider the perspectives of people of faith. That's legitimate."

## More links:

Letter to the Dispatch from a retired Kenyon College prof is basically correct on facts but strikes an unconstructive tone

<http://www.dispatch.com/content/stories/editorials/2014/09/03/1-house-bill-would-gut-science-education.html>

<http://www.dispatch.com/content/stories/local/2014/08/19/common-core.html>

<http://ncse.com/news/2014/08/creationism-ohios-antiscience-bill-0015827>

[http://www.cleveland.com/metro/index.ssf/2014/08/creationism\\_coming\\_to\\_ohio\\_classrooms\\_not\\_without\\_a\\_court\\_fight.html#incart](http://www.cleveland.com/metro/index.ssf/2014/08/creationism_coming_to_ohio_classrooms_not_without_a_court_fight.html#incart) related stories

Here's an example of what creationists are up to these days & how they talk to reporters. Note the very typical framing by creationists, trying to depict themselves as the underdog minority victim of viewpoint discrimination by dominant bullying academic science

<http://www.dallasnews.com/news/metro/20140814-dallas-researchers-are-out-to-scientifically-prove-the-biblical-version-of-creation.ece>

Gallup polls tell a very different story about the views of the public over the last 30 years: <http://www.gallup.com/poll/21814/evolution-creationism-intelligent-design.aspx> with about 45% consistently young-earth creationist and less than 20% of respondents thinking that humans could have appeared by natural processes without divine intervention disrupting natural law.

I look forward to meeting with the committee on Monday. Anyone should feel free to give me a call on any of this: 440-478-5292

Patricia

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# Gender Affirmation Coverage

- Effective 1/1/2015
- Anthem, MMO options
- Covered services to include:
  - Surgery
  - Hormone therapy
  - Behavioral health
- Excluded services to include:
  - Cosmetic procedures

# Coverage Details Pending

- Confirming in-network providers at Anthem, MMO
- Defining cosmetic vs medically necessary procedures

## Charge to the Committee on Graduate Studies

In the Constitution of the Faculty Senate, Article VI., Section D:

**Par. 1.** The Committee on Graduate Studies shall consist of the dean of graduate studies, *ex officio*, the associate vice president for research, *ex officio*, nine voting members of the University Faculty elected for overlapping three-year terms, and three graduate student members, ~~and~~ one post-doctoral scholar/fellow ~~elected for one year terms~~, and the professional school senator, elected for one-year terms *ex officio*. The Nominating Committee, in consultation with the dean of graduate studies, shall select nominees for election to the committee on the basis of participation in graduate research and in graduate study and instruction. Such selection shall be broadly representative of graduate disciplines.

**Par. 2.** The Committee on Graduate Studies shall review and recommend to the Faculty Senate with respect to the academic standards, academic policies, -and degree requirements of all departmental, inter-departmental, inter-divisional constituent faculty, and ad hoc and special programs under the administration of the ~~dean~~ School of Graduate Studies. With respect to graduate degree programs, the Committee on Graduate Studies shall review and make recommendations to the Faculty Senate on individual interdisciplinary degree proposals, new degree programs, joint/dual degree programs, as well as changes in degree program name or delivery mode. Graduate degree program refers to any course of study that constitutes a specialization or concentration and leads to recognition or an award for completion of a prescribed course of study beyond the baccalaureate diploma with the exception of the degrees of Doctor of Medicine, Doctor of Dental Medicine and Doctor of Jurisprudence. The committee also reviews and makes recommendation to the Faculty Senate with respect to graduate certificate programs at Case Western Reserve University.

**Par. 3.** The Committee on Graduate Studies will provide oversight and guidance for academic and policy issues for postdoctoral scholars and fellows.