# CENTRAL WASHINGTON UNIVERSITY

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## Information Services Organizational Review

September 3, 2013

BerryDunn

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**Information Services Organizational Review**
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## Executive Summary

Central Washington University (CWU) continues to address considerations from the BerryDunn Information Technology (IT) Assessment report dated June 5, 2012, in which one of the recommendations was to "consider IT staffing and organizational structure changes that will improve IT service quality, efficiency, and utilization of resources."

The objective of this project was to further inform decisions about IT staffing and organizational structure changes by conducting a targeted assessment of the University's current IT organization and management practices.

Our work entailed issuing surveys and conducting interviews with ITS staff and managers. We also surveyed and interviewed other University stakeholders with respect to their experiences with the ITS organization on campus. In this process, participants identified strengths, weaknesses, opportunities, and threats within the current IT organization, considering both ITS and other IT service providers across campus. In total, we received survey feedback and/or conducted interviews with 80% percent of ITS department members and with 20 campus stakeholders.

The findings and recommendations presented in this report are based on our objective analysis of the feedback we received, industry best practices, and our team's collective experience. Our analysis was further informed by the knowledge that we gained by performing the IT Assessment in 2012 and our understanding of the changes that have occurred since that time.

This report depicts overall themes of the organizational review in the form of findings and recommendations. The specifics of individual comments were kept confidential. In our work we validated key findings with multiple sources, including one-on-one interviews.

The following points provide an overview of the recommendations identified as an outcome of our analysis:

- The ITS department organization will benefit by merging Client, Computer, and Auxiliary Computing Services under one Director of Customer Services, and merging Telecommunications into the Network and Operations group. It will be important for the resulting team of ITS Directors and the CIO to work collaboratively to strengthen customer service, improve communications, promote managerial and leadership competencies throughout the organization, and proactively plan for future needs.

- Another aspect of organizational improvement can be gained by establishing functional ERP teams that facilitate collaboration between technical and functional staff. A Functional Lead for the PeopleSoft Campus Solutions Student Information System should also be created.

- As part of the University's IT project management function, establish the role of a Relationship Manager to facilitate communication and understanding between the academic and business side of the University and ITS. Initially, this role would be focused on developing and maintaining an effective working partnership between ERP functional staff and the Enterprise Application Services group within ITS. Over time, the Relationship Manager role should extend to improving coordination with other decentralized IT services across campus, such as academic technology support services and website services.

- Plan and budget for increased technical and soft skill training of the IT workforce. Consider how individualized training goals of ITS staff can be most effectively aligned with the department's cross-training needs and succession planning. Establish accountability for meeting training goals as part of the ITS professional development program.

The findings and recommendations of this study are fully presented in the following pages. We also present current and proposed ITS organizational charts in Section 3 of this report.

We caution readers that, while some of the content in this report may be perceived as critical, the objective of our analysis was to provide constructive feedback that helps the University's community of IT service providers be most successful in their roles.

We also caution readers against making assumptions about any specific feedback that may appear to be reflected in this report, and encourage the focus of attention be towards the recommendations rather than issues described herein.

We thank the leadership and staff at CWU for the courtesy and cooperation extended to us during this project.

# Section 1 | SWOT Analysis

The following pages provide a summary compilation of strengths, weaknesses, opportunities, and threats (SWOT) that were identified as a result of our survey and interview process. Please note that specific comments have remained confidential and do not appear in this report.

**Figure 1: ITS Organization SWOT Analysis**

| Strengths | Weaknesses |
|---|---|
| *Organizational elements that positively impact the effectiveness of IT services.* | *Organizational elements that negatively impact the effectiveness of IT services.* |
| <ul><li>High proportion of long-term IT staff represent large body of institutional knowledge</li><li>Reorganization of Security unit outside of ITS has resulted in progress addressing security needs</li><li>Recent improvements in project communications around iCAT project</li><li>Stronger relationship between Networks and Operations and Computer Support Services has led to improved coordination</li><li>Progress building new IT governance model that serves to improve coordination and communication across functional areas</li><li>Development of pre-screened IT job candidate pool has strengthened ability to fill position vacancies</li></ul> | <ul><li>Inconsistent focus on customer service</li><li>Departure of key IT staff (high turnover in some areas of IT)</li><li>Long-term staffing vacancies</li><li>Apparent culture in IT that is resistant to change</li><li>Declining confidence in IT leadership</li><li>Insufficient succession planning</li><li>Inconsistent levels of training for technical and soft skills among ITS staff</li><li>Insufficient collaboration and communication across organization units, both within and outside of ITS</li><li>Disconnect between user expectations and ITS resource capacity</li><li>Lack of documented and formalized procedures related to IT services</li></ul> |
| Opportunities | Threats |
| *Opportunities to build upon existing elements of the IT organization in order to improve upon the effectiveness of IT services.* | *Elements of the IT organization that have the potential to negatively impact the effectiveness of IT services in the future.* |
| <ul><li>Relatively new management in Network and Operations, Security, and Auxiliary Computing Services presents an opportunity to improve culture and lead change</li><li>Utilize pre-screened pool of IT job candidates to fill vacancies</li><li>Reinstate Student/Financial Aid/Student Finance/Admissions lead to facilitate communication between IT and the four functional student areas</li></ul> | <ul><li>Departure of CedarCrestone staff may lead to staffing gaps and technical knowledge loss</li><li>Continued decline of staff morale across the ITS organization</li><li>Continued departure of IT staff and loss of knowledge</li><li>Skill/competency gap resulting from inadequate prioritization of and planning for training/staff development</li></ul> |

## Section 2 | Findings and Recommendations

Following are findings and recommendations derived from our work on this project.

In the course of our analysis, we sometimes noted areas where we received conflicting feedback. In these instances we corroborated our analysis using multiple sources, including our in-person interviews, and then focused on overall themes with respect to the ITS organization.

Findings have been grouped into ten areas, which are presented below.

| Description of Findings |
|---|

**1. Resistance to Change**

ITS staff and stakeholders reported that within the ITS department there is a tendency to resist change. Our analysis of feedback points to the following elements that have likely led to ITS demonstrating resistance to change initiatives:

1. Job Security – Staff are concerned that their skills will become obsolete as technology changes.

2. Training – Staff are concerned that they will not receive sufficient training to support new technology.

3. Comfort – Staff are comfortable with the status quo.

4. Technical Concerns – Staff may not be confident that a change is technically appropriate.

5. Communication - Insufficient communication and engagement for change initiatives.

It is important to note that while this resistance to change was apparent in many survey responses and discussions that we held with ITS staff and stakeholders, there were also ITS staff who demonstrated an eagerness for change and a vision for how certain changes could improve IT operations and customer service.

**2. Morale**

Discussions and survey feedback from ITS staff and other stakeholders indicated that morale within the ITS department is generally low. The impacts of low morale are widespread; impacting customer service, openness to change, and level of collaboration both internally and externally with the rest of the campus.

Our analysis of survey feedback and interviews indicates that low morale is likely a result of multiple factors, including frustration with unsuccessful change attempts in the past, a perceived lack of control over decisions that impact the IT environment, historical layoffs, and a recent increase in employee turnover. Additionally, most of the issues identified in this organizational study have contributed to decreasing morale in the ITS department. Addressing these issues should result in notable improvements to employee morale.

The department has also struggled to find the right balance between information security and customer service, historically having a reputation for being too restrictive in limiting functional user access to PeopleSoft. The recent addition of a Chief Information Security Officer and security unit separate from ITS has helped to improve this situation; however, we still heard talk of an 'us vs. them' mentality that persists throughout the ITS organization.

Some individuals felt that morale could be improved with better communication and collaboration both within ITS and with stakeholders.

### 3. Customer Service

ITS staff and stakeholders reported that the level of customer service in ITS needs improvement. While there is a recognition that many individuals within ITS strive to be helpful and responsive, the overall culture of customer service needs to be more consistent across the ITS organization.

Support needs related to enterprise applications, networking, infrastructure, and telecom are either passed through the Help Desk or requested directly from the service provider. By the nature of their roles, these service providers tend to be more technically focused than customer service oriented. ITS has attempted to strengthen the customer service focus across the organization by including customer service in the professional development program; however, feedback indicates that customer service remains a challenge.

### 4. Communication around IT Projects

There is an overarching sentiment that decision-making practices driven by groups outside of ITS do not consistently consider the potential impact on ITS teams. Similarly, stakeholders felt that communication about internal ITS projects was insufficient. Knowledge silos and inconsistent engagement of stakeholders during project planning and implementation compounds the lack of communication, which often results in frustration and is detrimental to the success of the project.

It was reported that project communication has significantly improved since the Chief of Staff took leadership for the iCAT project in March. This improvement has been attributed in part to the Chief of Staff's assertion that all project-related concerns be addressed during project meetings, and not in informal, post-meeting conversations. This type of communication appears to have helped establish greater transparency, understanding, and coordination among project stakeholders from ITS, CedarCrestone, and the functional areas.

### 5. Relationships between ITS and the Campus IT Community

There are multiple IT-related services at CWU that are, by design, decentralized from the ITS organization:

- Faculty support for academic technologies, such as Blackboard, is provided by the University's Instructional Resource Specialist, who reports to the Associate Provost.

- Human Resources and Financial Services each have a Lead Functional System Analyst, who serves the needs of the functional users and data custodians by working directly with the appropriate technical lead within the Enterprise Application Services group.

Decentralizing these positions has enabled these staff to focus on services that align with the specific goals of their departments. However, it has also presented challenges related to maintaining the appropriate level of communication and coordination with ITS, particularly related to knowledge sharing, University IT projects, and decisions that impact specific systems and services.

Survey and interview feedback revealed that there is a recognition that improvements in communication and collaboration will improve the ITS department's ability to provide good customer service, while also setting clearer expectations for other stakeholders and customers.

## Description of Findings

**6. Coordination for Campus Solutions**

PeopleSoft Campus Solutions is the University's Student Information System. As described in the preceding issue, Human Resources and Financial Services each have a Lead Functional System Analyst, who serves the needs of the functional users and data custodians by working directly with the appropriate technical lead within the Enterprise Application Services group. An equivalent role does not currently exist to support functional and technical coordination for Campus Solutions, which currently requires coordination between ITS and the five functional users representing records, student financial services, and admissions.

Both ITS staff and stakeholders reported frustration due to a need for more proactive and productive communication, particularly between functional ERP users and technical staff with the Enterprise Application Services group. BerryDunn's Information Services Assessment Report, dated June 2012, recommended that the University "establish the role of a Lead Functional System Analyst to improve coordination between the Enrollment Management Department, the Office of Institutional Effectiveness, and the Enterprise Application Services group." To date, this position has not yet been established, and lack of coordination and communication between ITS and the five functional leads that comprise Campus Solutions continues to be a point of frustration for both functional and technical staff.

**7. Training and Professional Development**

A desire for more consistent training and professional development was common among both ITS staff and stakeholders. Representatives from several internal groups cited lack of fiscal resources and time as barriers to maintaining a consistent training program.

Among ITS staff, attitudes toward training were mixed. It was reported that while some staff desire training, others avoid it. Additionally, some employees reported that they had not participated in any formal training in five or more years.

Some individuals in ITS commented that they were transferred to a new role without sufficient training or preparation, including both technical skills and managerial skills.

CWU makes use of the state job classification system, with technical positions that range from ITS I through ITS V. Using a general classification system of this nature can sometimes contribute to a misconception that an individual's skills are transferable to a technical role in a different area.

Like any small organization, employees are expected to demonstrate a certain level of flexibility; however, some positions require a baseline level of specialized technical knowledge. Understanding these baseline competency requirements can inform the development of a training and cross-training plan that builds depth and flexibility into the organization.

**8. Proactively Managing Staffing Transitions**

Throughout our interviews it became apparent that ITS has struggled to maintain a 'full bench' of qualified staff. Recently, this issue has had the greatest impact on the Enterprise Application Services group. In July, the Enterprise Application Services group lost two long-term employees in key technical roles, including a PeopleSoft Administrator (also acting as the interim Director of Enterprise Applications) and an Oracle Database Administrator (DBA). The unit does not have staff resources to fill the gap created by the vacancy of these positions, and consequently, is in a situation where it must

| **Description of Findings** |
|---|
| rush to find and recruit qualified job candidates.

The group also had a number of long-term vacancies that were recently filled. Most of these positions have been filled in the past six months, and Enterprise Applications now has seven new staff, representing nearly 50% of the entire unit. This, in conjunction with the changes accompanied by the iCAT project, has resulted in a situation where the Enterprise Application Services group has a significant training void to fill while still performing day-to-day job responsibilities.

The challenges facing the Enterprise Application Services group are indicative of the need for better planning around changing needs and staffing transitions. Historically, the University has struggled to recruit and retain highly qualified technical staff. While hiring from within will not always be an option, the University can strengthen its ability to do so by focusing on staff development through performance reviews, mentoring, and training. |
| **9. ITS Management Team**

The AVP of Information Technology oversees seven direct reports, including two directors and five managers. Feedback from stakeholders and ITS staff indicates that communication, collaboration, and coordination across the IT management team is not consistent. This has perpetuated the development of knowledge silos, has limited the ability of ITS to establish a customer centric focus across the organization, and has impeded the effectiveness of both strategic and tactical planning efforts.

Functioning of the ITS management team needs to be strengthened. This includes focusing on the cultivation of management and leadership behaviors across all levels of the IT organization. |
| **10. IT Leadership**

Feedback surrounding ITS department leadership was mixed. While some individuals felt that they were receiving sufficient support and direction from IT leadership, others expressed doubts in the ability of ITS leadership to facilitate change and effectively represent the ITS department among the University's leadership team.

Across higher education, the role of IT leaders is changing. Today's successful IT leader is both a technologist and a business leader, working with executive leadership to achieve institutional goals through more effective use of technology. As communication and relationship building become more important, so does the role of the ITS management team in taking on increasing levels of responsibility. As the ITS management team takes on more operational responsibility, the IT leader's focus should shift towards campus communication, relationship building, and better understanding business needs.

A 2011 CIO study performed by the EDUCAUSE Center for Analysis and Research (ECAR) used survey feedback from IT leaders across 900 institutions to identify the qualities that have the greatest impact on CIO success. The top three qualities identified were the ability to communicate, think strategically, and influence. Appendix B provides a full list of the CIO qualities ranked as part of the ECAR study. |

**Recommendations**

Collectively, implementing the following recommendations will help the University remediate many of the challenges currently facing the ITS organization. There is not a 'one to one' relationship between our findings and recommendations. In many cases, one recommendation addresses multiple issues. The matrix below describes our recommendations and indicates issues most directly impacted.

| Recommendation Description | Issues Addressed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1. Resistance to Change | 2. Morale | 3. Customer Service | 4. Communication around IT Projects | 5. Relations btwn. ITS & campus IT Comm. | 6. Coordination for Campus Solutions | 7. Training and Prof. Development | 8. Proactively Managing Staffing Transitions | 9. ITS Management Team | 10. IT Leadership |
| **1. Organizational Changes**<br><br>The following points describe changes to the ITS organization structure. These changes are illustrated in Section 3 of this report, which provides a current IT organizational chart and a proposed IT organizational chart.<br><br>• Merge telecommunications and network and operations units, and develop management positions within merged group to ensure that staff receive appropriate guidance, direction, and oversight.<br><br>• Strengthen customer service focus by merging customer facing services (Customer, Computer, and Auxiliary Support Services) under one Director of Customer Services. In addition to managing these three customer facing groups, the Director would be responsible for working closely with the rest of the ITS management team to ensure that customer service is most effectively and consistently delivered throughout the ITS organization. Managers for each of the three teams would help to ensure that each unit continues to receive dedicated leadership and management support for day-to-day operations.<br><br>• Establish the role of an IT Relationship Manager as part of the project | | x | x | x | x | x | | | x | |

| Recommendation Description | Issues Addressed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1. Resistance to Change | 2. Morale | 3. Customer Service | 4. Communication around IT Projects | 5. Relations btwn. ITS & campus IT Comm. | 6. Coordination for Campus Solutions | 7. Training and Prof. Development | 8. Proactively Managing Staffing Transitions | 9. ITS Management Team | 10. IT Leadership |
| management function. The Relationship Manager would oversee partnerships between ITS staff and distributed IT resources, with particular focus on the ERP teams that are comprised of ITS analysts and functional leads. Areas overseen by the IT Relationship Manger would maintain current reporting lines, but would also have a dotted reporting relationship with the IT Relationship Manager. Please see Appendix A for a detailed description of the IT Relationship Manager role.<br><br>In addition to establishing the IT Relationship Manager role to facilitate these teams, the University should also consider physically locating these teams in one central location in order to promote more consistent knowledge sharing and communication. | | x | x | x | x | x | | | x | |
| **2. Address Technical Training Needs**<br><br>The need for technical training is apparent across the divisions. Specifically, the following areas represent potential gaps in competencies and technical skills that we identified as part of this organizational study:<br><br>• PeopleSoft<br><br>    o Technical staff should receive targeted training that will prepare them for the transition that occurs with the departure of CedarCrestone. Much of the iCAT specific training should be provided by CedarCrestone; however, with seven new hires and other staff who have not received sufficient technical training in multiple years, there is also a need to address gaps in | x | x | | | | | x | x | | |

| Recommendation Description | Issues Addressed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1. Resistance to Change | 2. Morale | 3. Customer Service | 4. Communication around IT Projects | 5. Relations btwn. ITS & campus IT Comm. | 6. Coordination for Campus Solutions | 7. Training and Prof. Development | 8. Proactively Managing Staffing Transitions | 9. ITS Management Team | 10. IT Leadership |
| foundational technical skills required to support the PeopleSoft environment. | x | x | | | | | x | x | | |
| o   Develop and implement a plan for effective knowledge transfer between CedarCrestone consultants and ITS technical staff. If necessary, reconsider project timeline to ensure that knowledge transfer is effective, especially in light of relatively high volume of new hires in Enterprise Application Services group. | | | | | | | | | | |
| •   Voice over Internet Protocol (VoIP) – Staff will require new skills as the University continues to expand VoIP and phase out the traditional phone system. Budgeting for these initial training needs should occur as part of the VoIP implementation planning process, as well as an overall recurring technology training plan. | | | | | | | | | | |
| Each team's training budgets and resources should be evaluated to determine if additional resources are necessary to address gaps in technical skills. The University should take steps to establish accountability for meeting training goals as part of the ITS professional development program. | | | | | | | | | | |
| **3.   Address Soft Skill Training Needs**<br><br>The ITS organization needs to address the need to develop management competencies and to strengthen the focus on customer service. Targeted soft skill training will be an important aspect of the strategy for improving both of these areas: | x | x | x | | | | | x | x | |

| Recommendation Description | Issues Addressed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1. Resistance to Change | 2. Morale | 3. Customer Service | 4. Communication around IT Projects | 5. Relations btwn. ITS & campus IT Comm. | 6. Coordination for Campus Solutions | 7. Training and Prof. Development | 8. Proactively Managing Staffing Transitions | 9. ITS Management Team | 10. IT Leadership |
| • Management – Promotions into supervisory-level positions should be based on demonstration of management capabilities. To support staff in developing these capabilities, the ITS professional development program should facilitate the identification of staff with management potential, and the provisioning of management training to support those staff in their career development. <br><br> • Customer Service – ITS staff should be required or encouraged to participate in training programs that support a culture of strong customer service. Customer Service is one of the measures included in the ITS professional development program. Accordingly, annual performance reviews present a good opportunity to integrate customer service training into individualized training plans. <br><br> Each team's training budgets and resources should be evaluated to determine if additional resources are necessary to address gaps in soft skills. The University should take steps to establish accountability for meeting training goals as part of the ITS professional development program. | x | x | x | | | | | x | x | |
| **4. Perform Succession Planning and Leadership Development** <br><br> As part of the professional development program, ITS needs to implement succession planning and leadership development to ensure that critical roles are not at risk for becoming vacant, to help support retention of high performing staff, and to cultivate a core competency of management and leadership skills in the ITS department. | | x | | | | | x | x | x | x |

| Recommendation Description | Issues Addressed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1. Resistance to Change | 2. Morale | 3. Customer Service | 4. Communication around IT Projects | 5. Relations btwn. ITS & campus IT Comm. | 6. Coordination for Campus Solutions | 7. Training and Prof. Development | 8. Proactively Managing Staffing Transitions | 9. ITS Management Team | 10. IT Leadership |
| ITS leadership needs to ensure that promotions are accompanied by sufficient training and expectation setting. If a position is not immediately backfilled, there should be plan in place for transitioning that individual into their new role while the previous role is filled. The 'player-coach' role is inevitable during a transition, but should not become a long-term norm. | | x | | | | | x | x | x | x |
| **5.  Develop a Plan for Cross-training**<br><br>As part of the professional development program, ITS needs to plan for the cross-training of technical staff to ensure that the viability of key systems and services are not dependent on any one individual. | | | | | | | x | x | | |
| **6.  Establish Functional Lead for PeopleSoft Campus Solutions**<br><br>The University should establish the role of the Campus Solutions Functional Lead to improve coordination and communication between ITS and the five functional leads that collectively represent Campus Solutions.<br><br>The organizational relationship between the Campus Solutions Functional Lead, the ITS Enterprise Applications Services group, and the IT Relationship Manager is illustrated in Section 3, Organizational Structure. | | | x | x | x | x | | | | |
| **7.  Strengthen ITS Leadership**<br><br>The University needs to strengthen ITS leadership in ways that demonstrate the following attributes:<br><br>• Proactive interactions with stakeholders across the University to build | x | x | x | x | x | x | x | x | x | x |

| Recommendation Description | Issues Addressed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1. Resistance to Change | 2. Morale | 3. Customer Service | 4. Communication around IT Projects | 5. Relations btwn. ITS & campus IT Comm. | 6. Coordination for Campus Solutions | 7. Training and Prof. Development | 8. Proactively Managing Staffing Transitions | 9. ITS Management Team | 10. IT Leadership |
| and maintain trust and confidence in the ITS organization. | x | x | x | x | x | x | x | x | x | x |
| • Strong orientation towards customer service. | | | | | | | | | | |
| • Ability to establish priorities, motivate staff, and effect change. | | | | | | | | | | |
| • Ability to develop a strong management team and foster a cooperative work environment. | | | | | | | | | | |
| • Excellent communication skills – ability to listen well and understand user needs, discuss technology in a way that is understandable to non-technical users, and share relevant information proactively with the appropriate stakeholders. | | | | | | | | | | |
| • Maintains a forward-looking vision for the future of IT while managing current technologies. | | | | | | | | | | |
| 8. **Strengthen Project Management Practices** | x | | x | x | x | x | | | | |
| • Continue to develop the IT project management function to better meet project coordination and execution needs of the University. Plan for how the implementation of Team Dynamics will be leveraged to inform decision-making and support effective and efficient project management practices at the University. | | | | | | | | | | |
| • Sustain practices that have positively impacted the iCAT project over the past six months, such as ensuring that project questions/concerns are addressed during project meetings and not in informal, post-meeting | | | | | | | | | | |

| Recommendation Description | Issues Addressed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1. Resistance to Change | 2. Morale | 3. Customer Service | 4. Communication around IT Projects | 5. Relations btwn. ITS & campus IT Comm. | 6. Coordination for Campus Solutions | 7. Training and Prof. Development | 8. Proactively Managing Staffing Transitions | 9. ITS Management Team | 10. IT Leadership |
| conversations.<br><br>• Include relevant stakeholders in meetings, planning sessions, execution, and testing phases of projects that may potentially impact the ability for impacted areas to function effectively (both during and after the close of the project). Involving the right technical and functional IT staff will help project planning committees manage expectations and forecast potential staffing issues, resource depletion, timing, feasibility, etc. Knowledge sharing throughout the duration of a project process may be more effective than a sharing session at the close of a project, as involvement throughout the process will greatly increase internal understanding that will help with maintenance of the project in the long term. | x | | x | x | x | x | | | | |

# Section 3 | Organizational Structure

Exhibit A below presents the current organizational structure for the IT Department. On the following page, we have provided a recommended organizational structure based on the findings and recommendations from this review (Exhibit B).
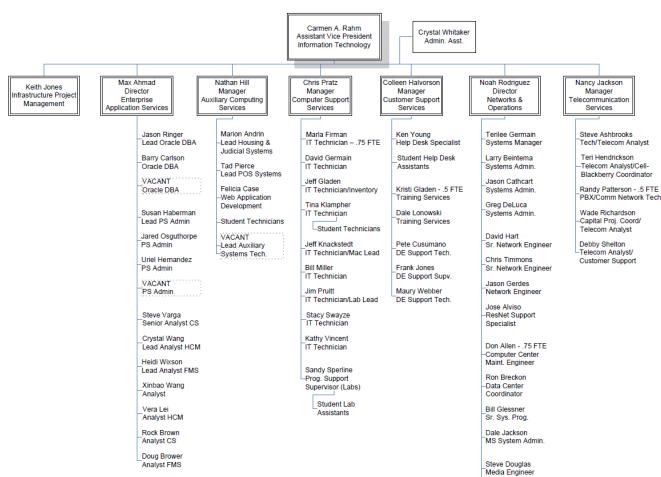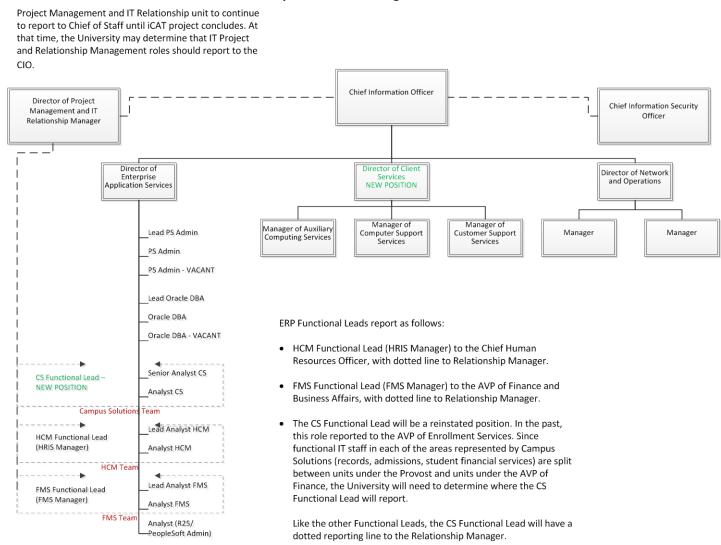
**Exhibit A: Current CWU ITS Organizational Structure**

## Exhibit B: Proposed CWU ITS Organizational Structure

Project Management and IT Relationship unit to continue to report to Chief of Staff until iCAT project concludes. At that time, the University may determine that IT Project and Relationship Management roles should report to the CIO.



ERP Functional Leads report as follows:

- HCM Functional Lead (HRIS Manager) to the Chief Human Resources Officer, with dotted line to Relationship Manager.

- FMS Functional Lead (FMS Manager) to the AVP of Finance and Business Affairs, with dotted line to Relationship Manager.

- The CS Functional Lead will be a reinstated position. In the past, this role reported to the AVP of Enrollment Services. Since functional IT staff in each of the areas represented by Campus Solutions (records, admissions, student financial services) are split between units under the Provost and units under the AVP of Finance, the University will need to determine where the CS Functional Lead will report.

  Like the other Functional Leads, the CS Functional Lead will have a dotted reporting line to the Relationship Manager.

**Summary of Changes in the Organization Structure**

The following points describe the recommended changes from the current to the proposed ITS Department organization structure.

- Merge telecommunications and network and operations units, and develop management positions within merged group to ensure that staff receive appropriate guidance, direction, and oversight.

- Strengthen customer service focus by merging customer facing services (Customer, Computer, and Auxiliary Support Services) under one Director of Customer Services. In addition to managing these three customer facing groups, the Director would be responsible for working closely with the rest of the ITS management team to ensure that customer service is most effectively and consistently delivered throughout the ITS organization. Managers for each of the three teams would help to ensure that each unit continues to receive dedicated leadership and management support for day-to-day operations.

- Establish the role of an IT Relationship Manager as part of the existing IT project management function. The IT Relationship Manager would oversee partnerships between ITS staff and distributed IT resources, with particular focus on the ERP teams that are comprised of ITS analysts and functional leads. Areas overseen by the IT Relationship Manger could maintain current reporting lines, and also have a dotted reporting relationship with the IT Relationship Manager.

The Proposed ITS Organization Chart also reflects the creation of ERP functional teams, which include both Enterprise Application Services staff and Functional Leads representing each of the three major systems that comprise the ERP environment. In developing these teams, we also recommend that the University reinstate the role of the Campus Solutions Functional Lead. Functional Leads would not report directly to ITS; however, these positions would be recognized as integral to their respective ERP teams.

In addition to establishing the IT Relationship Manager role to facilitate these teams, the University should also consider physically locating these teams in one central location in order to promote more consistent knowledge sharing and communication.

## Appendix A | IT Relationship Manager – Suggested Roles and Responsibilities

The following points describe key aspects of the roles and responsibilities of the IT Relationship Manager:

- Facilitating communications across and between functional and technical divisions
- Understanding the different goals, perspectives, and world views of both functional and technical staff, and encouraging collaboration between the two groups
- Socializing ideas, concepts, and potential projects in a manner that takes into consideration the goals and challenges of both functional and technical IT staff
- Encouraging increased effectiveness, efficiency, and quality through working as a cohesive group within IT
- Acting as Point of Contact for different departments
- Increasing visibility across the IT organization
- Maintaining a client advocate position, promoting a customer-centric approach to providing IT services

As an example, Florida State University has established an IT Relationship Manager position to help facilitate the alignment of IT services with the needs of the University. Their description of the IT Relationship Manager position speaks to many of the same roles and responsibilities that we would envision for an IT Relationship Manager at CWU.

**Florida State University – Relationship Manager Job Description**

The role of the Relationship Manager (RM) is critical to ensuring IT alignment with the business. This role is an extension of the CIO/IT Organization, acting as liaison and bridging/facilitation communication and understanding between the business and IT. The RM is responsible for understanding the overarching business model as well as the intricacies and nuances of their assigned functional business areas. The RM helps their assigned business areas develop business cases that effectively illustrate the value of the need – from cost/benefits to the alignment of the organization's goals.

The RM helps with prioritization of solution requests and approved projects within the project portfolio, ensuring that projects align with the technology that best provides maximum return on investment, and helps direct IT strategy in support of the overall business goals.

When effectively implemented, this role blurs the line between the business and IT, creating a seamless ability for the business to leverage the services and expertise of the IT organization to obtain the business automation solutions necessary to ensure mission execution success. An individual successful in this role will be viewed both as a contributing member of the functions they represent and the information technology team.

**Duties:**

Responsible (Fulfills the task independently)

- Establishes/maintains relationship with internal technology teams and external technology vendors
- Identifies opportunities for operational efficiency
- Facilitates Service Level Agreement (SLA) negotiations for internal and/or external technology deliveries

- Directs Projects towards desired technology strategies

Accountable (Fulfills the task by coordinating others efforts)

- Develop long-range technology strategies
- Initial Business Case/Needs Analysis outlines
- Provides initial project estimates for cost-benefit analysis
- Defines/Develops Functional Specifications
- Overall solution/implementation delivery for projects aligned to their business area
- Project issue resolution

Consults (Advises on the task)

- Participates in technology aspects of the business-sponsored RFIs/RFPs
- Evaluates project objectives
- Project prioritization
- New business initiative analysis

Informed (Is advised on the task)

- Gains understanding of business strategies
- Gathers information on competitor technology
- Stays abreast of industry trends in the business and technology

Source: http://news.cci.fsu.edu/cci-job-board/it-relationship-manager/

## Appendix B | EDUCAUSE Center for Analysis and Research: Qualities Needed to be a Successful CIO

A 2011 CIO study performed by the EDUCAUSE Center for Analysis and Research (ECAR) used survey feedback from IT leaders across 900 institutions to identify the qualities that have the greatest impact on CIO success. The following figure provides an overview of CIO responses in ranking these qualities.

**Figure 2: Perception of Qualities Needed to be a Successful CIO**