

## A Thought Piece: Working together for a better ITS

### Introduction

This document is the result of discussions among a small group of ITS leaders who see the possibilities and potential for our future, as ITS, and IT at Penn State. The MOR Associates IT Leaders Program has taught us that leaders are strategic, and results matter. Those two principles have guided our group from its inception in September 2011 to the present.

At the request of Kevin Morooney, the Vice Provost and CIO of Information Technology, our group was asked how we might build a sustainable, vibrant cadre of IT leaders over the next two years. We were asked how we could expand what we were doing and where we go from here. This document includes our recommendations on values, structure, and areas of opportunity.

### Background

Our shared vision in ITS has been focused around Goal 6.3 of the Penn State Strategic Plan: “Re-Balance Centralized/Dispersed Facilities/Services for Greater Efficiency and Effectiveness,” and the need to start thinking like IT at Penn State, resulting in the formation of the IT Leadership Council. The IT Assessment and Core Council recommendations have affirmed this direction. As we look to the IT strategic planning process and new University leadership in 2014, we must be able to demonstrate the value of IT as a strategic asset.

Staff in ITS have been eager to contribute and build the future of ITS, yet finding a tangible way to do this has been elusive. While we've seen progress in forming partnerships and collective activities across units, there is much work to be done to get our “ITS house in order”; open the doors for collaboration, cooperation and trust; adopt a unified organizational approach to ITIL; plan together; and reach “budget synchrony.”

As IT in Higher Ed has been undergoing significant change, governance has become an integral part of IT decision making. Communities of IT leaders and advisory boards are playing a larger role in informing and influencing Executive Leadership. If IT is to be a strategic asset in the future, we must leverage our strengths: our talent, our investments (people, common tools, hardware), and the services we provide. With this in mind, we recommend the creation of the ITS Collaborative (or ITSCollab) to engage and unleash the organizational will to make the transformative changes to do just that.

### Values

We value and uphold the ITS principles in all that we do. As stated by Kevin:

- **Care** – about yourself, one another, the customer, expertise
- **Serve** - our customers, ideas, one another
- **Reach** - for improvements, deeper into a relationship, a new experience
- **Respect** - one another, ourselves, our discourse

We support, and incorporate Kevin’s four themes in our approach. These are demonstrated in leveraging the strength of being ITS; recognizing and affirming that IT at Penn State is larger than ITS, and strengthening our relationships with campuses and colleges; putting the core business of Penn State in the center of service design and delivery; and developing a culture of collaboration and teamwork.

## **Structure**

The proposed structure consists of three bodies, the ITS Collaborative, Working Groups, and a Steering Committee. It is our intent that the steering committee membership will change through elections or appointments, and we will work out those details over this next year.

### **ITS Collaborative or “ITSCollab”:**

We work together for a better ITS; we think about IT and not our individual units; we build partnerships internally and externally; we identify areas of organizational opportunity for agility, efficiencies, collaborations and innovation; we seek to leverage and add value to other initiatives across our organization.

Our behaviors and actions demonstrate commitment to excellence; we hold ourselves, and others accountable; we take on challenges and see them through. As members, each of us is expected to actively participate and contribute.

### **Working Groups:**

As needed, working groups will be initiated to make progress on deliverables. These groups will be led by a “working group lead” and group membership will be based on skills, experience, and the ability to contribute, providing opportunities for participation and skill development of ITS staff. These working groups will be open to members of the PSU IT community, and stakeholders will be represented or consulted as necessary.

### **Steering Committee:**

To support the ITS Collaborative, a steering committee will perform administrative functions, bring forward recommendations, and act as an advisory team to Senior and Executive leadership. It will consist of eleven members, including one member of the Senior Leadership Team, and the Vice Provost of Information Technology who will serve as an ex-officio member.

## **The “Foundational Four”**

In an effort to build collaboration expediently and create the change that is required, we focused on four interlocking areas of opportunity: Trust/Decision Management, Service Portfolio Management, Project Portfolio Management, and Talent Portfolio Management. These four areas represent industry standard best practices in Project Management, the ITIL Framework, and Financial, IT and Human Resources, and contribute to overall IT strategy through improved organizational planning, budgeting, resourcing and collaboration. Once implemented, they will improve the quality of our services and deliver value to our customers through designed service channels, improved decision-making, optimized processes, organizational agility, and innovation.

### **1. Trust / Decision Management**

Trust is the foundation of all successful relationships, change efforts, collaborations, partnerships, and ventures. Building upon the ITS Community Principles, the development of a strong trust framework will allow ITS to make transformative changes in the way we operate, the value we deliver, and the quality of service to our customers.

As an organization, we must continue to build trust and learn how to trust. This begins with a shared vision, communication, transparency, openness, and leaderly behaviors. Trust is rooted in open and honest communication. This extends to communication of goals, requirements, expectations, timelines, success criteria, and ground rules. As collaboration matures across IT, it is transparency and openness that will continue to strengthen the trust necessary to be successful. Efficiencies will be gained, as Project, Service, and Talent Portfolio Management strategies and processes are instantiated across ITS.

A strong trust framework will evolve over time with each successful engagement. Positive experiences aligning systems, resources, and services will provide structure upon which to build. Well-established trust will naturally increase confidence, loyalty, and energy of those involved in creating a healthy organization.

Initial efforts to enhance trust across ITS include leveraging our engagement with MOR Associates to reinforce norms for behaviors that promote trust and leadership. We will develop resources and communications to clarify expectations, create a common understanding of resource sharing, and demonstrate benefits that can be achieved.

## **2. Service Portfolio Management**

The objective of Service Portfolio Management is to optimize the business value and investment in IT services through a services' lifecycle approach. A Service Portfolio will provide ITS with a comprehensive and accurate view of services across all units. It will allow us to analyze existing services, cost, reduce duplication, determine appropriate service "homes" for ongoing support and maintenance, and will create an opportunity and ability to expand our services to meet business need and demand. This will have a direct impact on improving overall customer service. It is also a step towards an institutional investment in ITIL.

Significant effort was put forth to create the current Service Portfolio view, much of which has been documented on a wiki. We will leverage this work and engage members of that group in this process. The initial focus of this work will be on the publication of a unified view (service catalog) of ITS services. This list of services will be accessible in a single location (not on unit webpages) and contain updated and detailed information about the services such as features, service owners, ordering steps, and cost (if applicable).

Subsequent work will focus on completing the missing elements of the portfolio, analyzing data, identifying duplicate services, determining how best to consolidate where applicable, and identifying service "homes." The portfolio (internal to ITS) should also capture "internal" services (or "infrastructure"), as those are likely areas in which duplication is most prevalent. As we reduce duplication and realign our services, communicating this work within IT at PSU will give ITS credibility and demonstrate our commitment to following the recommendations of the IT Assessment / Core Council.

## **3. Project Portfolio Management**

Project Portfolio Management is an ongoing process to select and manage projects, and determine optimal resources for delivery and schedule activities based on organizational goals, business value and strategy. Ensuring our most important strategic and operational projects are adequately planned, resourced, and funded is essential to ITS' success. Project portfolio management would provide a complete picture of all projects across the organization to include ongoing maintenance and operational

activities, facilitate prioritization at the organizational level, enable resource management, simplify cross-unit collaboration, reduce duplication of effort, and support reporting and metrics. It will provide input to governing bodies and allow us to plan together and make better decisions.

Initial steps towards implementing a unified organizational approach to ITIL in this area include creating a glossary of definitions to reach a shared understanding of terminology, determining required and optional attributes for projects, and identifying current tools and potential tools to leverage. Some of this work will overlap with the Service Portfolio Management work. And, of course, many projects will lead to services or service changes, so we believe that the definition of a thorough transition process is warranted. We will leverage work previously done in the Change Management committee and support that effort moving forward. Additionally, the IT Project Management group has become a very active and vibrant community and would be an excellent resource to facilitate much of this work.

#### **4. Talent Portfolio Management**

An integral piece of our organization's future success is the ability to manage talent. Data about our staff skills, knowledge and experience will inform resource decisions as they relate to Service and Project Portfolio Management. We will know what skills we have and where our talent is located across the organization. This will enable agility.

Talent Portfolio Management will also allow us to assess our overall training needs, address gaps in skill areas, intentionally increase or decrease specific skill-sets, find "experts" on staff who can teach or train others, and provide leadership and professional development "stretch" opportunities for staff. This will be an important contribution to effective planning of IT's future at Penn State.

The initial focus of this endeavor will be on data collection and the application of that data to a project related to the ITLC Task Force work. This will provide an ITS view of resources on a Task Force and demonstrate the value of this data for all of IT. We recommend starting with an ITS employee skills inventory to include: technical, non-technical, leadership, and management/supervision capabilities; knowledge; interests; and experience. Familiarity with University business processes, functions, and units will also be captured as part of this effort. Once this data is collected, it will be used to develop skill profiles across ITS for aligning staff with the project priorities and ongoing service commitments of the organization.

Subsequent efforts will include a Talent Management Infrastructure (system/tool) that will enable ITS to take a comprehensive approach to: talent acquisition and retention, performance management, professional development, compensation, and succession planning. Ultimately, this effort will not be limited to ITS.

#### **Next Steps**

The "foundational four" are our thoughts on what we would like to see happen as we build the future of ITS together. We know you have ideas and hopes for a desired future state for ITS. What do you want to see?

Prepared by the former "its coffee group": Sue Gavazzi, Andrea Harrington, Randy Hegarty, Mark Katsouros, Jim Leous, Christy Long, Chris Lucas, Krystal McMillen, Susan Morse, George Otto, Marcus P Robinson, Cheryl Seybold, Renee Shuey, Bill Welch