

# Information Technology Assessment and Strategic Planning at Ohio University

## THE OPPORTUNITY

Ohio University is a research university located in southeastern Ohio with its main campus in Athens. Ohio University has a total enrollment of approximately 35,000 students, with more than 1,100 full-time faculty and 200,000 alumni, and an annual operating budget of approximately \$650 million.

Like many public institutions, Ohio University has faced a series of financial pressures, including reductions in state funding, changing student demographics, increased competition for students, and heightened scrutiny of its costs. In response, Ohio University has chosen to implement a Responsibility Center Management (RCM) budgeting process to achieve efficiency and transparency, improve financial management, promote positive incentives, and openly emphasize principles and priorities in the budget.

The transition to RCM places an increased focus on the administrative services provided on campus as the deans have more visibility and control of the services they use. Accordingly, the university decided to evaluate its finance, human resource, facilities and information technology divisions to identify opportunities for improving cost, delivery and overall satisfaction of those services.

Huron Education is helping Ohio implement the RCM budget model. As a part of the engagement, Huron was asked to complete an assessment of Ohio University's Information Technology division, focusing on governance, organizational structure and customer engagement. At the conclusion of the assessment, Huron was asked to work closely with IT and its stakeholders to develop a customer-focused IT Strategic Plan for the following two to three years. The objective of these initiatives was to identify opportunities to align services with customer needs as the university transitions to the RCM budget model and to develop a plan for improvement with clear metrics to report progress to the university community.

## THE APPROACH

### Phase 1 - Information Technology Assessment

Information Technology in an RCM budget system must deliver the services that its customers need in a timely and cost efficient manner. The underlying structures and processes need to facilitate communication within the IT organization and among users to ensure that resources are committed to the right activities.

To complete this assessment, Huron conducted a series of individual and focus group interviews with representatives from across OU. Huron also analyzed available data, and benchmarked Ohio operations against a number of comparable institutions to determine the funding and staffing levels that would be appropriate for the IT operation at Ohio. Based on these findings, Huron provided a series of recommendations and a supporting roadmap to address the following core areas:

- IT governance process and how priorities are established
- Re-alignment of the IT organization to support its customers
- Transparency of services and their associated cost to deliver
- Customer engagement and communication
- Metrics reporting and service level agreements

### Phase 2 - IT Strategic Plan

The IT Strategic Planning process incorporated the outputs from the assessment and focused on answering the following question: Given Ohio University's resource constraints and overall capacity, what would be the key priorities for Information Technology over the ensuing two to three years? To develop this plan, Huron partnered with Ohio's IT leadership to incorporate the internal planning that had been completed to date and led a series of

**“The Huron engagement provided Ohio University with an objective, balanced assessment of the IT function, and established a strategic plan that prioritized and focused our efforts over the next three years. A key outcome of this process was the establishment of a framework to have ongoing conversations with leaders across the institution as to how we should operate in the future and to ensure that we are always pursuing the projects that will provide the most impact for the university.”**

Stephen Golding,  
Vice President for Finance and Administration and Treasurer,  
Ohio University

interviews and focus groups to identify customer needs across the institution.

Senior leaders were asked to define their vision and the needs for information technology in relation to the institution's strategic plan. This information was supplemented with a targeted survey and additional interviews that, together, identified the highest priority investments in technology across campus.

Huron's approach was to work closely with IT, university leadership and a stakeholder group of representatives from across campus to iteratively build and review the plan. It outlined a series of goals and objectives, as well as metrics, to measure and report progress. The metrics were developed to provide transparency and feedback to the university community at regular intervals and were aggregated around a few core areas. Some examples of the metrics used include:

- Governance Review and Approval Tracking
- Project Status Tracking
- Overall Faculty and Staff Satisfaction
- Overall Student Satisfaction
- Employee Satisfaction
- Percentage of FTE Time Allocated to Projects

### THE RESULTS

The IT Assessment provided a series of detailed recommendations and a roadmap to support the university's transition to an RCM budget model. The report focused on aligning the IT organization with its customers' needs, establishing a transparent and effective governance structure, and developing a strategic plan with clearly defined metrics.

The recommendations provided guidance to simplify the IT organizational structure from a customer perspective by creating alignment with the core constituency groups, such as faculty and administration. The revised structure provided the customers with clear lines of communication to and from the IT organization and increased the coordination of resources within IT.

The final report also addressed this key outcome: a series of detailed recommendations for the governance structure

and a disciplined process for demand and portfolio management. The portfolio management design evaluates not only new project proposals, but also includes a periodic review of ongoing projects to assess whether they should be continued.

The IT Assessment helped to inform the IT Strategic Plan, which established a transparent and accountable process to help university leaders monitor progress and provide feedback at key points. The plan also identified a series of goals to meet the needs defined by university leadership and customers, as well as provide a framework to manage the use of IT and university resources over the near term. The following six goals were developed during this process.

- Enhance support and innovation for instruction, learning, and research
- Acquire and retain the appropriate skills and resources to align with the institution's mission
- Foster collaboration and customer service through proactive partnerships with students, faculty and staff
- Serve constituents utilizing university-wide information systems by increasing access to these systems and institutional data
- Provide a sustainable, flexible and secure infrastructure
- Pursue operational excellence in the management of technology resources and delivery of services

The IT organization developed a series of initiatives to accomplish the objectives. In some cases where little or no background existed for an objective, an initiative was created to define a strategy and develop a plan for moving forward.

These projects have provided Ohio University with an understanding of its current technology infrastructure and established clear goals and objectives for IT over the next two to three years. The engagement of senior leadership, deans, faculty, administration and students has established institutional priorities and a shared vision for moving forward.