Administration and Finance Full Program Review

Submitted June 2016
Executive Summary

Brief Overview

The Program Review was scheduled for completion before fall 2015. The review was purposefully delayed to allow to regroup after.

A concerted effort was made to staff the committee with representatives from within the division of Administration and Finance, as well as stakeholders from outside of the division.

This program review focuses on four fundamental issues, in addition to the standard program review focal areas.

These items include:
A. Recruitment and retention of employees.
B. Strengthening of partnerships with key functional areas.
C. (to inform effective departmental direction and allocation of resources.
D. 
E. Standard Program Review focal areas.

The decision was made that data gathering would revolve around individual subcommittees, including those responsible for stakeholder surveys, focus groups, interviews, SWOT review, document reviews and visits from an external reviewer.

Recommendation (Item C):
The Program Review Committee did not provide detailed recommendations regarding item C (above). Therefore, it is recommended to form a task group to study the issue. It is recommended that the task group contact peer institutions to inquire how they obtain viable input from end-users. In addition, research should be conducted by the task group to ascertain best practices associated with obtaining viable input from. (Note: The External Reviewer did provide a recommendation for item C – See page 17)

Recommendation (Item A):
Given recent compensation related discussions and decisions to create pay related sub-banding for , it is recommended that an be conducted that will allow effective use of the soon-to-be finalized sub-banding guidelines.

Position Description Document Review

Summary Findings:
The Position Description Document Review subgroup noted a few inconsistencies in the use and description of the organizational values, particularly in the context of employee position descriptions.

Summary Recommendations (Item E):
Review the associated detailed findings and recommendations listed below and enact feasible modifications and adjustments.
Mission, Vision, Values Document Review

Summary Findings:
The Mission, Vision, Values Document Review team found [company] has an opportunity to better align its mission, vision and values with [guiding documents] guiding documents and with minor modifications, create greater clarity around the documents.

Summary Recommendations (Item E):
Review the associated detailed findings and recommendations listed below and enact feasible modifications and adjustments.

Website Review

Summary Finding:
The Website Review team found that the [company] website displays accurate information; however, the layout is challenging to navigate.

Summary Recommendations (Item E):
It was noted that the [company] website has maintained the same structure for quite some time in anticipation of an upgrade to the [IT] website, which is in process. Suggestions were made for [IT] to consider when upgrading the [company] website.

Executive Director Interview

Summary Findings:
[Executive Director] is making progress on many fronts, but requires additional resources to ensure it remains “cutting edge.” Much work has been done to ensure alignment with all customer areas, handle the dramatic increase in projects, refine systems and prioritize projects, and structure the organization to efficiently and effectively provide excellent service.

Summary Recommendations (Item D):
Add [additional resources] to further support efficiency of projects and train them fully in workflow.

Customer Survey

Summary Findings:
[Customer] fared very well on this survey. Most respondents agreed that [project managers] provide appropriate feedback on projects. Customers perceive [company] may require additional staff resources and the [process] was a concern of some customers.

Summary Recommendations (Items B & D):
Add [additional resources] to further support efficiency of projects and train them fully in workflow. Review the [process] and consider revamping to address concerns of the respondents.

Employee Survey

Summary Findings:
Employees understand their duties, are familiar with [mission], and understand their respective roles [roles]. Respondents felt they possessed adequate knowledge to do their jobs and obtain adequate guidance and clear instructions [leadership]. Some voiced concern over lean resources, a need for more staff and compensation, partnership with stakeholders and stakeholder accountability as areas for potential improvement.

Summary Recommendations (Items A, B, & D):
Add two more developers to further support efficiency of projects and train them fully in workflow. IS should continue to utilize the current method for assigning projects and assess its effectiveness on an ongoing basis over the next year.

Employee Focus Group

Summary Findings:
Focus group respondents indicated that two to three additional employees are needed in varied capacities. More strides in project management may be required, but should come in time. Communication is o.k., but continuous improvements are being made. Some suggestions to improve assignment of projects were made. More collaboration with stakeholders was suggested.

Summary Recommendations (Item A & B):

Add two more developers to further support efficiency of projects and train them fully in workflow. IS should continue to utilize the current method for assigning projects and assess its effectiveness on an ongoing basis over the next year. Provide opportunities to collaborate with stakeholders to better understand business processes and get BA’s more involved at the very beginning of projects. Establish a university-wide pay scale work, establish a staff fitness program, ensure developers receive accurate requirements and test cases and require employees to follow existing procedures.

External Review

Description:
The external reviewer for this project was from the University of Virginia. She provided excellent, detailed recommendations. Below you will find only a brief synopsis. The recommendations provided by should be reviewed carefully by and incorporated where appropriate.

Summary Findings:
The external reviewed heaped praise for the way that stakeholders viewed the department. They were amazed by the amount of work accomplished by the team with limited resources. The should feel proud of this. noted many findings that were based on 1) End user and customer feedback, 2) Staffing retention, skills and training, and 3) Planning, coordination and communication of priorities, as well as work assignments and governance and collaboration and stakeholders.

Summary Recommendations (Items A, B & C):

1) End user and customer feedback:
   
   ・ Add usability and testing to the feedback process and obtain feedback by observing users.

2) Staff retention and skills training:
   
   ・ Evaluate the existing telecommuting and alternate work schedule policies and build some guidelines for.
   ・ Conduct a telecommuting or alternative work schedule on a trial basis for 6 months and if it does not work, revoke the privilege.
   ・ Reduce Span by looking at establishing a project management office.
• Provide more resources can work closely with departments, but can also be responsible for helping implement and evaluate new functionality and help with reporting and testing. Align these resources with the.
• As the continues to build a group of , communicate and share the value of those roles with the departments and stakeholders.
• Provide some level of project management training to and stakeholders.
• Develop a budget for providing rewards and recognition based on the JMU Rewards and Recognition Program.

3) Planning, coordination and communication with stakeholders:

• Continue to refine the issue process, possibly having a working group review them for opportunities in combining and streamlining.
• Share all of the initiatives and is undertaking and the resource implications with stakeholders and staff.
• For stakeholders and staff, clarify resource implications to support the delivery of new or changing services.
• Provide a web page and keep it current on strategic or high profile , with clear communications on the impact of these projects on the stakeholders and timing on .
Primary Report

Introductory Statement

This program review is part of a continuing effort in Administration and Finance (A&F) to periodically assess all units within the division. A&F units undergo a full program review every ten to twelve years and an alternate cycle program review between each full review. This series of program reviews was begun by the divisional Senior Vice President with the intent of improving the division’s level of customer service and the overall efficiency of operations. The division’s program review schedule and protocol have been prepared to be consistent with the general expectations of the university’s regional accrediting body — the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC).

Overview

Description of Program Review

The  [REDACTED] Program Review was scheduled for completion before fall 2015. The review was purposefully delayed to allow  [REDACTED] to regroup after a serious data breach.

Phase 1 of this review began just prior to summer 2015. The following August, the program review’s co-chairs (Rick Larson and Kevin White) met with the department director and AVP to develop expectations, goals, objectives, issues, committee member recommendations and a work schedule.

A concerted effort was made to staff the committee with representatives from within the division of Administration and Finance, as well as stakeholders from outside of the division.

[REDACTED], requested that this program review focus on four fundamental issues in addition to the standard program review focal areas. These four items include:

- Recruitment and retention of employees.
- Strengthening of partnerships with key functional areas.
- Methods of obtaining feedback from  [REDACTED] to inform effective departmental direction and allocation of resources.
- ...  [REDACTED] ...

Phase 2 began in September 2015 with a full committee meeting. The committee finalized and approved a work plan and designated subcommittees. The decision was made that data gathering would revolve around individual subcommittees including those responsible for stakeholder surveys, focus groups, interviews, SWOT review, document reviews and visits from an external reviewer.

Mission, Vision, Values of Unit

Mission

We are committed to  [REDACTED]

Vision

We strive  [REDACTED]
Departmental Values

* Employees perform their job ethically and legally.

* Effective and ethical data stewardship is a critical element of performance. Staff consistently guards the data to which he or she has access. The privacy of students, faculty and staff is kept secure.

* The quality of our work and the data is of utmost importance to the successful use of systems written and supported. Staff ensures that their work meets standards and industry best practices. Quality of work is a given. Data quality issues are identified and resolution is sought by working with our customers.

* It is impossible to list every job requirement on an Employee Work Profile. Employees are expected to perform additional tasks in keeping with their positions as needed. Staff regularly demonstrates a willingness to perform tasks not explicitly stated in the Employee Work Profile in the interest of serving the university and department’s vision.

* All deadlines are expected to be consistently met. IS employees will meet deadlines unless extenuating circumstances dictate adjustments. When deadlines must be changed, appropriate authorization from management as well as affected customers must be obtained. Documentation as to the reasons for delay will be created.

* Demonstrate the department’s commitment to customer service, which implies effective interpersonal behaviors demonstrated toward internal customers, members of the department and external customers. Customer service behaviors such as accuracy, friendliness, courtesy and promise fulfillment are consistently observed on the part of the staff.

* All Information Systems staff members are part of a larger team and as such, are expected to regularly and consistently demonstrate effective team building behaviors such as optimism, cooperativeness and encouragement. An important part of the university’s vision involves helping to affect positive change. Therefore, flexibility and openness to change are important qualities in any IT employee. Other members of the IT Team consistently comment positively concerning each staff member’s cooperativeness, empathy, professionalism and accuracy.

* The university recognizes that our staff is our most valuable resource. The challenges of technology, along with the value of our human resources, require an investment in professional development by the department, as well as each employee. Each employee will complete and document a minimum of 25 hours of professional development each year.

* Open communication is the key to successful teamwork and customer service. Open communication with department management is a priority. Information is shared freely, so that the department is prepared to address issues and to support customer needs.

Key Elements of SWOT Analysis

Strengths
Customer Service Success:
- This comment is generally supported by customer survey data
- Response time usually meets or exceeds expectations
- Communication is clear, professional, instructional, informative and supportive
Weaknesses

- Not enough resources to build specialist teams
- Retaining resources – competitive salary
- Employee morale, teamwork outside their unit
- No performance metrics

Opportunities

- Currently all positions are filled
- Canvas system to provide additional support (iPad configuration)
- Automation of HR System, closing the gap/”Functional & Technical” disconnect

Threats

- Losing personnel to UVA
- Exclusive knowledge holders
- Change in structure – existing personnel being passed up for promotion
- Information security locking down access, inhibiting productivity

Program Review Committee (Name, department, committee role)

- Angel, Mark W – Finance – Position Description Review, Mission/Vision/Values Review
- Aydin, Lisa Rene – Parking – Mission/Vison/Values Review
- Brown, Bryan Eric – Student Affairs – Employee Survey
- Combs, Linda C – Bursar’s Office – Previous Program Review
- Davis, Drew – Information Technology – Customer Survey, Position Description Review
- Dean, Susan Josephine – Telecommunications – Goals & Objectives Review, SWOT Review
- Foreman, Kim – College of Business – Position Description Review, Mission/Vision/Values Review
- Gardner, Rick – Financial Aid – Website Review
- Hedrick, Steve – Human Resources – Pay Structure Analysis
- Hinkle, Becky – Card Services – Customer Survey
- Lamm, David W – Information Technology – Customer Survey
- Larson, Rick – HR, Training and Performance – Final Report compilation
- Latchum, Ann – University Advancement – Goals & Objectives Review, Website Review
- Manning, Joseph Patrick – Admissions
- Senger-Puckett, Tamara – Admissions
- Shackelford, Kristi L – Academic Affairs
- Taylor, David Rives – University Advancement – Employee Survey
- White, Kevin Jerome – Athletics – Co-chair and External Review Visit
- White, Michelle – Registrar’s Office – Customer Survey

Research

Overview

Research Subcommittee #1 – Position Description Document Review

Description
The subcommittee to position descriptions met initially on Our approach to the review was to have each of the three subcommittee members review five of the 15 position descriptions. While reviewing core responsibilities/measures was within scope of the review, emphasis was placed on evaluating the position description mission, vision and values.
The subcommittee met on [12/3/15] to compare and discuss findings. We found the individual core responsibilities and measures clearly describe the breadth, depth and expectations of the positions. We found that mission, vision and values are incorporated into all position descriptions; however, there is some inconsistency.

Findings and Recommendations

Finding:
Innovation is noted as a value in all position descriptions; however, [innovation] is not mentioned as a departmental value.

Finding:
Professional development is noted as a departmental value; however, professional development is not mentioned in all position descriptions.

There was some discussion whether the following is actually a value:

"It is impossible to list every job requirement on an Employee Work Profile. Employees are expected to perform additional tasks in keeping with their positions as needed."

It was suggested that [IS] consider using this as the value instead:

"Staff regularly demonstrates a willingness to perform tasks not explicitly stated in the Employee Work Profile in the interest of serving the university and department's vision."

Recommendation:
Incorporate innovation into the departmental values.

Recommendation:
Incorporate professional development into position descriptions.

Recommendation:
If appropriate, incorporate the same values/measures across all [IS] From our review, we believe this was the intent, but with modifications to positions over time, it is understandable that they do not currently match.

Research Subcommittee #2 – Mission, Vision and Values (Guiding Documents) Review

Description

The Mission, Vision and Values Review Subcommittee set out to evaluate the mission in the context of the documents, the JMU guiding documents and best practices associated with the development of mission, vision and values.

Findings and Recommendations

Finding:
The MVV Subcommittee was unable to locate the mission, vision and values for the section of on their website:

Recommendation:
Create link to mission, vision and values on [landing page: ]
Finding: current mission, vision and values statements do not closely align with mission, vision and values as stated in the Information Technology Strategic Plan 2014-2020.

Recommendation: mission, vision and values should align with mission, vision and values as stated in the Information Technology Strategic Plan 2014-2020. Information Technology's mission, vision and values are:

**Mission:**
Deliver services that enable the university community to learn, innovate, collaborate and provide excellent service.

**Vision:**
Enhance learning, collaboration and service delivery through application of strategic technologies and secure universal access.

**Values:**
We value collaboration—both within IT and with those we serve—because it helps us understand and support the technology needs of the entire university community.
We value innovation because it helps us solve technology challenges and meet the needs of our diverse university community.
Being trustworthy—ethically delivering reliable services—is non-negotiable in how we serve the university community.
It is important that we focus on service,
We value responsiveness,
We will be forward-looking

Finding: current vision statement is task oriented and mostly grounded in the current day-to-day operations of the department.

Recommendation: Create a vision statement that is aspirational, outlining what the department seeks to accomplish in the future. Note the JMU vision statement: “To be the national model for the engaged university…” Note the IT vision statement: “Enhance learning, collaboration and service delivery through strategic technologies and secure universal access.”

Finding: There are currently nine departmental values. Each value statement contains two or more sentences. It is difficult to ascertain the true departmental values.

Recommendation: See examples of value statements outlined in Strategic Plan (Information Technology Strategic Plan 2014-2020). Delete extraneous text and highlight key values in each statement. Consider reducing from nine to six or fewer departmental values.

Finding: Current mission, vision and values are incorporated into all departmental employee work profiles.
**Recommendation:**
Ensure alignment of any new mission, vision and values with the individual Employee Work Profiles.

**Research Subcommittee #3 – Website Review**

**Special Note:** This review focuses on the website which includes website. It is not the responsibility to respond to this item since the site is not structured organizationally. There is a planned restructure of website in the works. The information is included because the site could have an impact. Again, there is no need to respond to these findings.

**Description**

The Website Review Subcommittee met on and shared analysis of peer institution website comparisons. Our main focus was on "ease of use," the organization of content and options.

**Findings and Recommendations**

Analysis included the following websites:

- Old Dominion University
- George Washington University
- Emory University
- University of Virginia
- University of Delaware
- Rutgers University
- William & Mary
- George Mason University
- Towson University
- Stanford University

**Finding:**

**Finding:**

**Finding:**

**Finding:**

**Finding:**

**Recommendation:**
Redesign the website to be mobile friendly. This may include eliminating unnecessary pictures or graphics, limiting the amount of information on each page and using graphic techniques to visually divide pages into segments of related content.
Recommendation:

Consider arranging content by function and by constituent. For example, if the purpose of a page is to list software downloads, further subdivide the list by constituent. If in this example a student was looking for software, it would be helpful for him/her to click on a "Student" tab or other visual queue and then only see a list of software downloads available for students.

Recommendation:

Enable a "Chat" Help Desk option.

Recommendation:

Have all Help Desk option information available on one page (phone number, online ticket submission, chat or walk-in).

Recommendation:

Consider a Help Desk "Knowledge Base" self-service option.

Research Subcommittee #4 – Director Interview

Description

The Director of [ ] was interviewed to ascertain 1) progress since the previous full program review dated [ ]; 2) policies and procedures; and 3) progress on goals and objectives.

Findings and Recommendations

Finding:

[ ] is up-to-date on accomplishment of Goals and Objectives.

Finding:

Additional resources are required to ensure that [ ] remains “cutting edge.”

Finding:

[ ] is meeting the basic needs of the university, but would like to do more. Currently, work is being done to create priorities by collaborating with stakeholders. Work is being done to ensure that the appropriate resources are being allocated to get the job done.

Finding:

[ ] are needed to support efficiency of projects and funding is required to train them fully in [ ].

Finding:

There has been a greater emphasis on [ ] to ensure more effectiveness and efficiency. There is a bit of resistance to this change, which is expected. Most employees are positive about this. Progress is being made.

Finding:

[ ], it was noted there was disconnect between [ ]. Lots of work on all sides has resulted in improved dialog and relationships among groups. [ ] continues to ensure alignment between all areas.

Finding:

[ ] policies and standards are reviewed and updated on an on-going basis. There is currently emphasis on discussing and refining prioritization criteria.
Finding:
The most common suggestion for IS from customers is that IS assign staff to specific modules and applications. For example—have a person that is responsible for Financial Aid and is the expert in all aspects of the technology that supports Financial Aid. IS is not resourced to be able to do this and instead uses a model where staff are utilized across the applications based on skills and time. End-users would prefer to have one person they always work with, but it would require at least double the staff currently in IS to support this model.

Research Subcommittee #5 – Customer Survey

Description

The Customer Survey team utilized the Qualtrics tool to survey key IS customers. The list of customers was based on the list of key customers/contacts provided by IS. The survey link was sent via email on 2/2/16 and the survey was available for online completion from 2/2/16-2/22/16. A follow-up email to customers was sent on 2/17/16. Of the 61 surveyed, we received 30 responses. Survey categories gathered respondents’ feedback in the following categories:

- Customer experience
- Satisfaction with individual systems supported by IS
- Overall satisfaction with IS
- Satisfaction with the PIQ process
- Communication regarding IS

Respondents were also provided numerous free-text fields to add comments, and they were asked for suggestions on improving communication and service. While the individual comments did not reveal any major themes to be noted for findings and recommendations, the team recommends review all comments for potential follow up with customers.

It is difficult to draw meaningful conclusions from the survey data around satisfaction with individual systems supported by IS. In addition, the committee had difficulty determining how to interpret neutral responses (e.g. neither agree nor disagree, neither satisfied nor dissatisfied.) It cannot be determined from the data alone whether someone truly was neutral, did not have enough experience or data to form an opinion, or perhaps did not feel comfortable responding. We attempted to weigh the number of neutral responses in conjunction with all responses for a particular item and draw conclusions accordingly.

Overall, 97% of respondents indicated they are very satisfied or satisfied with their interaction with IS regarding those systems important to them and 82% of respondents indicated they received adequate communication from IS around the project roadmap.

Findings and Recommendations

Finding:
A high percentage of respondents rated IS highly (83%+ agree/strongly agree/neutral) across most areas of their experiences.

Finding:
76% agree/strongly agree or are neutral that project/resource managers give sufficient feedback on the status of their request(s).
Recommendation:
Consider revisiting the frequency that status updates are provided to customers and ensure expectations are shared with customers.

Finding:
Only 50% agree/strongly agree or are neutral [_____] has sufficient staff resources to accomplish what is expected of them; 37% disagreed/strongly disagreed.

Recommendation:
Evaluate current staffing levels in relation to current and projected needs.

Finding:
Only 60% agree/strongly agree or are neutral that reducing testing time by 10% would allow sufficient testing time for projects, updates and changes to the systems with which they work. 17% disagreed/strongly disagreed.

Finding:
Four systems (UA - Campus Call, Cascade, Remedy, Xitracs) fell below an 80% very satisfied, satisfied or neutral rating (based on respondents who did not indicate “Do not use.”) Although the number of respondents for these systems is not statistically significant, IS may want to investigate further with their key stakeholders for these systems.

Finding:
Only 37% of respondents indicated satisfaction with the [_____] process. Comments included being asked questions that they do not know how to answer and the length of time the process takes.

Recommendation:
Review the [_____] process and consider revamping to address the concerns of the respondents.

Research Subcommittee #6 – Employee Survey

Description
The Employee Survey team utilized the Qualtrics tool to survey [_____] employees. The survey link was sent in early February and was available until February [______]. A reminder email to customers was sent February 9. Of the 44 surveyed, we received 23 responses. Survey categories gathered respondents’ feedback in the following categories:

- Duties and Responsibilities
- Training and Professional Development
- Resources
- Leadership

Respondents were also provided numerous free-text fields to add comments, and they were asked for feedback and suggestions on project assignment, efficiency and effectiveness, areas of high performance, and areas for improvement.

Findings and Recommendations

Finding:
Respondents agreed or strongly agreed that they understand their duties, are familiar with the mission statement, and understand the role that [_____] plays at JMU.

Finding:
Twenty-two of the 26 respondents agreed or strongly agreed that they understood the [_____] [______]. Three respondents were neutral and one disagreed.
**Finding:**
Respondents felt they had adequate knowledge to be successful in their jobs and felt there were adequate opportunities for additional training. There was less agreement that adequate time was allocated for training and professional development. It was noted by one respondent that workload “often preempts being able to participate in the offerings.”

**Finding:**
Eight of 26 (30.7%) respondents felt there was not adequate staff available to successfully meet customer demand. The majority of respondents felt they had proper tools to be successful, are given a reasonable amount of time to complete projects and have the proper expertise to meet customer demand.

**Finding:**
Regarding IS resources, one respondent noted a perception that the department was “lean resource wise” while One person suggested concern that other areas were getting resources and more collaboration might help dispel negative perceptions caused by this.

**Finding:**
Twenty-one of 26 respondents felt they received adequate guidance and/or support from and 22 felt the same way about leadership. In each case, there was disagreement or strong disagreement from one respondent. Fifty-seven percent felt that projects were managed efficiently while 11.5% felt they were not. All but one was positive or neutral regarding the consistency of guidance/direction from leadership being consistent with the mission. One respondent noted receiving excellent support from leadership.

**Finding:**
When specifically asked about whether the current method for assigning project leaders and staff to projects was efficient and effective, the following themes emerged:
- Some are not sure of the effectiveness of the process or with the current method
- Some felt more time is required before determining whether the current assignment process works
- Many felt the process is working fine
- Overall there are mixed feelings about this question

**Finding:**
When asked what does well, the following themes emerged:
- Customer service, meeting customer needs, customer response
- Work/life balance
- for employees

**Finding:**
When asked for areas for improvement, the following themes emerged:
- Stakeholder accountability
- Compensation
- Ensure good partnerships with stakeholders; better collaboration across areas
- Communication improvements may be needed

**Research Subcommittee #7 – Employee Focus Groups**

**Description**
Once the employee survey data was received, the committee reviewed the findings and listed areas that required further investigation or “focus.” Questions designed to clarify survey findings were listed, and
employees were invited to attend focus group meetings. Of the 44 employees invited, three agreed to
attend. Focus questions related to the following topics:

- Project Roadmap
- Professional Development
- Staffing
- Project Management and Assignment
- Communication
- Resources
- Collaboration with Stakeholders

Findings and Recommendations

Finding: Awareness of the Project Roadmap varies. It seems that employees are generally knowledgeable about this. Employees suggested that knowing the bigger picture is helpful, but not essential. IS is in a bit of a reactive mode given all the demands being requested.

Finding: Training is encouraged by IS, including training that goes beyond technical. Two of the three participants felt that being out of the office for training and losing productivity could be a restraining force for some employees.

Finding: When asked if more employees were needed, responses varied. The two employees who responded indicated that 2-3 people are needed in varied capacities.

Finding: When asked what advice they would give about project management, the participants noted that we should make more strides in project management discipline and keep working on accountability, formal documentation, test cases, ensuring scope is clear, and acquiring buy-in from everyone. It was noted that project management is improving.

Finding: Participants were asked how they felt communication could be improved. Respondents generally felt that it wasn’t that bad and that efforts have been made. It was noted that it’s up to each individual and individuals vary in their ability to communicate. They did suggest that 1) a central location to communicate changes that is searchable and 2) people need to use the process that are in place.

Finding: Focus group participants feel they have all the equipment and software they need to do their jobs.

Finding: Participants noted that work-life balance is good in IS, since employees work reasonable hours during the week and get weekends off. Even on-call hours are low compared to other places like in the corporate world.

Finding: When asked what should be done to improve assignment of projects, respondents indicated:
  - Do more cross-training
  - Determine opportunities to standardize across the three branches of PS
  - Eliminate the “pain” associated with getting and keeping access
Finding:
It was suggested in the survey that more collaboration with stakeholders would be a good thing. When asked what really might work here, the participants indicated:

- Understanding [redacted] and getting good requirements
- Make sure [redacted] are more involved at the beginning

Finding:
When asked if there is anything else they would like to share, respondents indicated:

- More centralized [redacted]
- University-wide pay scale for people who do [redacted] work
- Staff-fitness program tied to UREC
- Require people currently in departments to follow existing procedures before branching into new requirements

External Review
Finding:
Praise for the [redacted] team was shared by the stakeholders interviewed. They were amazed by the amount of work that was accomplished by the team with limited resources. The [redacted] team should feel proud.

Recommendation:

1. Meeting with the stakeholders on a monthly basis – the stakeholders believe these are valuable meetings and they are informative and helpful in planning initiatives. The meetings should continue to focus on all of the [redacted]
2. The stakeholders also thought the working relationships with the [redacted] were excellent and they wanted to continue to be involved in projects.
3. The stakeholders agree that there needs to be a form for project review, evaluation and prioritization (currently the [redacted] is used for this). As you will see in the recommendations, a review of the [redacted] should be conducted.
4. Understanding the limited resources- The stakeholders are very aware of the limited resources in [redacted]. The stakeholders feel focusing efforts on priorities on the student applications will benefit the students and advance the mission of university.
5. The [redacted] thought the weekly meetings with the [redacted] [redacted] were valuable in coordinating and planning.
6. Delivering quality service and uptime – the stakeholders said JMU and [redacted] organization pride themselves on meeting high-quality customer service and project deadlines.

End User/Customer Feedback
Finding:
Getting feedback from the [redacted], students and faculty to continue to improve services provided by [redacted] and understanding how those services are being used.

Recommendation:
JMU already has surveys that they use and I would continue to informally survey users as they take advantage of the services provided by [redacted], but I would also add usability testing to the
feedback process. You can offer the students some type of small reward for participating like candy or pizza.
https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/

Staffing Retention/Skills/Training

Finding:
Recruitment and Retention – Several of the interviewees said that it was difficult to keep resources in
Employees leave and go to departments or other schools for increased
compensation and more. James Madison University has

Recommendations:
The should evaluate these policies and build some guidelines for employees. I would recommend starting with positions that lend themselves to alternate work schedules, like . A recommendation would be to start with positions that require limited user/customer interaction and require more dedicated, focused, and concentrated technical efforts. are positions that require long periods of single task work or research. Provide some guidelines on core hours of work (i.e. everyone must be working 9:00 – 4:00, etc.). The leadership should make sure schedules are published and available to the team and stakeholders.

Recommendation:
Another recommendation would be to do a telecommuting or alternate work schedule on a trial basis for 6 months and if it does not work, revoke the privilege. Providing telecommuting or alternate work schedules would allow the team to feel they have some flexibility and it can also be more productive for the employee, because they can get started earlier in the morning and avoid the commuting time to work. You should ensure that the employee has an office environment at home. For the alternate work schedule, allowing people to work four (4) ten (10) hour days or four (4) twelve (12) hour days one week and four (4) eight (8) hour days the following week. Make sure you have Lync, Skype or other web tools to allow for effective communication and sharing and have adequate access/bandwidth for remote work.

Finding:
Staff Development - The Executive Director of has direct reports, which is a large span of control. Also there appears to be limited opportunity within for promotion. The organization is also building a group of and also has.

Recommendation:
A recommendation to consider would be continuing to build the project management skills and possibly look at a project management office that could lead complex more strategic projects across the organization, but also redefine the role to include project management skills and possibly more as well. This could allow for a tier structure for and also provide the team with individuals that could lead smaller projects focused on the applications they support. This would also provide promotional opportunities for the into , providing career opportunities and compensation for skills and levels of expertise.
Finding: 

pooling resources is a big advantage since it allows for more 
level loading of development resources and more focused skills in the development and integration tools. It is also an area where the functional knowledge is not necessary as long as there are

Recommendations: 

It was not clear to me how this organization worked together, but it did sound like there were some position-tiered opportunities for promotion from to . Developing relationships with the and the would allow for a better understanding of all initiatives and better resource planning. It would also allow for the technical analyst to get more involved working with the application managers in evaluating new functionality, something the stakeholders say they have very little time to do. The Another value of aligning the technical analyst more closely with the is the help it provides with the hand-off from specification to development, something the stakeholders mentioned was ineffective at times today.

Finding: 

are also in the departments and currently serve as liaisons from their departments to . Many of these individuals do testing, but do not look at new features and functionality delivered with the upgrades and bundles. The positions in the department serve as , report writers, and backfill for the department, so the skillsets are varied and training may not be as complete.

Recommendations: 

Provide more resources in that can work closely with the departments, but can also be responsible for helping implement and evaluate new functionality, help with reporting, and testing. Aligning these resources with the would also provide some leadership for projects. If this cannot be done, then establishing clear roles and responsibilities and including the testing and training requirements for the of the department should be incorporated in their position descriptions. Usually has a better understanding of the implications of changes across modules than individuals working in the department, so having strong relationships with and coordination needs to continue. Another value is that testing can be more tightly integrated across the modules and there may be opportunities for some automation of test scripts. The in the functional units also felt they did not have sufficient reporting tools. Some of this is directly related to their training and lack of understanding of the underlying table structures. The in the departments mentioned they do a lot of trial and error reporting. A value of having strong business analysts in would improve reporting capabilities.

Recommendations: 

As the organizations continues to build a group of project managers, a recommendation is to 
communicate and share the value of those roles with the departments and stakeholders. There is some 
confusion that there are too many layers in now, and requirements are often provided to several groups 
before development starts. A recommendation is to provide some level of project management training to not only the team, but also 
to the stakeholders.

Finding: 

James Madison University has a Rewards and Recognition Program: http://www.jmu.edu/humanresources/ files/salary-administration-plan.pdf,
Recommendation:
Promoting and rewarding individuals and teams for work, especially in the Information Technology field, is a way to retain employees and reward teamwork. A recommendation would be to develop a budget for these rewards and some guidelines for IS managers. Continue to reward employees for certifications and new skillsets acquired, but add in rewards and recognitions for projects and initiatives.

Planning/Coordination/Communication of Priorities between IS and Stakeholders

Finding:
All of the stakeholders understand the need for the PIQ or some type of request process, however transparency in the process for prioritization and how the PIQ ties into the planning database is not clearly understood.

Recommendations:

Finding:

Recommendations:

Finding:

Recommendations:

Finding:
Many stakeholders emphasized the need for continued and more formal communication on projects.

Recommendation:
Appendices

(RAW DATA APPEARS HERE)