CLAC 2006

Who Stole My Life? The Challenge of being an Executive CIO in Time of Change.

About Me

Began career in institutional research
Administrative Computing:
    Programmer/Analyst, Assistant Director
Systems
Became Chief Information Technology Officer at CoW in July, 2004
    First Person to Hold This Position

CIO Job Description Created by Tara Lynn Fulton
(Dean of Library and Information Services at Lock Haven University)
for the Conference at Kenyon (03/2006)

Essential Qualifications:
Political savvy in working harmoniously with other members of a senior staff in a college or university setting.
Uncanny knack for hiring the right people.
Familiarity with the full range of information and instructional technologies applicable on a college campus, and ability to convey their relevance to all disciplines in all appropriate communications forms.
Compelling values and philosophy about the role of information services in teaching and learning.
Evidence of creativity in matching individuals with roles.
Analytical, thoughtful, reflective.
Sense of humor, including about oneself.
Highly organized, yet also agile and flexible.
Careful, strategic planner, but opportunistic.
Entrepreneurial, but not a lone ranger.
Self-confident, yet self-effacing.
Mild-mannered and easy-going on the surface, but having an iron will about what really matters.
Expert problem solver, but not a micro-manager.
Not cut-throat, but willing to fire middle managers or staff who prove unable to change.
Patience of a saint in handling staff, yet deliberate in making progress.
Ability to manage technology user expectations without offending anyone.
Forward-thinking.
Clear-thinking.
Hard-working.
Likeable.

About Wooster

College's Strategic Plan 2003 – 2008

Eight Primary Goals--Three Related to Information Technology
Creation of the new CITO position and the resulting reorganization
Of IT took place in the context of the Strategic Plan

Old IT Organizational Structure (Until mid-2004):
User Services, Instructional Technology reporting to VPAA
Administrative Computing; Networks, Telecommunications & Systems
reporting to VPFB

Physical and Organizational Consolidation coincident with my arrival in S 2004
New Reporting Structure:
Four Departments Within IT, Each Department Head Reports to Me
Networks, Telecommunications & Systems
Staffing Consisted of a Director, one Systems Adminstrator,
One Telephone Technician and One Telephone Switch
Coordinator
Campus Network and Internet Connectivity
Servers
Telephone System
Cable TV

Administrative Computing
Staffing Consisted of a Director, two full-time and one part-time
Programmer/Analysts, one Operator
Critical systems running under MPE—desupport for that looming

User Services
Staffing Consisted of a Director, two User Support Specialists,
one Hardware Technician, two Interns
Help Desk Operation
Hardware and Software Acquisition
User Desktop Environment
Computer Lab Management

Instructional Technology
Prior to My Arrival 2.5 FTE
Vacant Directorship
Vacant Joint Faculty/Instructional Technologist Position
Upon My Arrival 1.0 FTE

IT was Strategic Focus Because the College Recognized Shortcomings
Related to IT
Some Related to Lack of Human Resources (16 – 18 FTE)
For 1800 students and 140 faculty
Some Related to old structure—no common agenda or set of
Priorities

Some Related to Lack of Focus and Professional IT Leadership
Wooster Lean & Mean
Responsibilities of VPAA for Admissions, FA

Challenges Upon My Arrival

Substantial Project Backlog (low staff levels, lack of common agenda)
Migration to SAN incomplete after two years
Migration to WebServer incomplete after two years
Others
Federal Grant
Network Upgrades (100 mb to all desktops)
VPN
Internet2
Encrypted, Authenticated Wireless Networking
Significant Deficiencies
No Professional Help Desk Tracking Software
No Desktop/Laptop Inventory
No inventory tracking system
No end user training

College Already Set Upon an ERP Implementation
End of Life Already Announced for MPE, application software -- 12/2006
Many administrative processes in need of reengineering
Arena Registration, Procurement
Existing staff untried, much too small for ERP implementation
Not active in implementing new functionality; stagnant,
No strong partnerships with user offices

Void in Instructional Technology Arena
No clear definition, understanding of instructional technology
Essentially understood as Audio-Visual or Media Services
Deliver projectors, provide sound, video for special events, replace bulbs--with only one staff person weren't doing that very well
Instructional Media Center—troubled partnership with the College libraries
Technologically enhanced classrooms worked, but design not informed by an understanding of relevant pedagogical issues
No real dialog with the faculty
Faculty feel underserved
Kauke Hall Renovation
Kauke is signature academic building
Big, High Profile Technology Project

20 teaching, learning spaces, all to be technologically enhanced
150 new computers, four important computer labs
Closure between May, 2005 and August, 2006

Integration of the IT staff into a new, cohesive whole

Roles of Departments, Individuals not clearly defined
Department Heads, engaged and engaging people,
Relatively Inexperienced,
Not Members of Their Professions, Unknown Quantities

IT Poorly Perceived by Faculty, other campus constituencies

Imbalance Between Resources and Expectations

Approach

Substantial Project Backlog

Met individually and collectively with IT Managers to compile project list and set priorities. Managers were **participants** in this.
Laid out **systemic reasons** for deficiencies.
Didn't blame the managers for deficiencies.
Partnership within IT.
It was going to take the best thinking of all of us to meet expectations and goals.
Narrowed focus of individuals and IT organization to projects at the top of our new ordered list
Shared project list and priorities with president and executive staff, also with faculty information technology committee. Provided regular updates.
Worked with managers to develop planning and reporting tools.
End projects with a bang rather than a wimper.

Approach allowed me to:
assess capabilities of individuals and departments within IT
refine role definitions in an organic way
begin development of IT as an integrated whole
establish work methodologies, tools, and expectations
build relationships with groups outside IT

. Smaller, more internal projects first—
Build confidence.
Then began to attack bigger, more visible projects:
Authentication Infrastructure (NSure; Active, eDirectory
January, 2005 encrypted, authenticated wireless in student union. Since then all academic buildings.
April, 2005 VPN service.

October, 2005 internet2 connection.
Over this period completed network switch upgrades.

Successes:

Improved confidence, self-image within IT
Signalled change to faculty, others. Break with the past.
Enhanced external confidence in IT
Gave IT greater control of agenda
Provided new, enhanced services to students, faculty, staff

ERP Implementation

Could talk forever about this….Big body of literature devoted to ERP Implementations.

Need had been established before I arrived—made things easier

Tried to delay implementation until 2006. Not possible for technical and political reasons.

While following the strategy just outlined to deal with our project backlog Team was being assembled team from across campus to select new software. All significant groups represented—including faculty.

I led the software selection team. Also, I chair the campus-wide implementation oversight committee. In general, not a good idea for CIO. Why?

Contract signed with Datatel in December.
Implementation underway in January, 2005.

GL, Accounts Payable, Purchasing	July, 2005
Admissions	October, 2005
Financial Aid	December, 2005
Academic Records, Registration	March, 2006
Accounts Receivable	June, 2006

Halfway through this month.

Still to go:

Housing	Summer, 2006
Upgrade to Release 18	Summer, 2006
Degree Audit	October, 2006
Alumni/Development	July, 2007
HR/Payroll	January, 2008

ERP implementations are extraordinarily complex and challenging. Wooster has faced and continues to face many challenges. **Some arise from timing:**

A/D implementation coincides with final year of capital campaign.
The timing of Datatel's A/D redevelopment forces us into a major upgrade of the software suite at an inopportune time.
An unanticipated change in leadership in Admissions occurred just as that implementation began.
Short, short, short implementation timeline.

Some challenges arise from institutional starting point:

Web-based registration (huge cultural shift)
Institution-wide procurement system (another huge cultural shift)

Some are related to the factors that made IT a strategic focus:

Did not have the necessary staff as the project was initiated—
Hired analyst for finance in early February. Live in July.
Hired project manager in March. People new to the Institution in key leadership roles.

Increased the size of the staff. Two additional analysts in Administrative Computing. An additional systems administrator in NTS. A Day to day project manager (term). Communications intern.

There can never be enough communication during these upheavals.
Appeared before the faculty several times prior to and early in the Implementation to tell them what was coming.
Explained rationale. We have to…We have to… We have to
It's in the Strategic Plan…It's in the Strategic Plan
In addition to faculty representation on the overarching project Oversight committee, put together a group of faculty
To advise us on the matters they most care about—
Registration and advising. They participated in detailed Way in decision making process.
They assumed ownership. Allies. Advocates in Faculty meetings.

Void in Instructional Technology

CITC, faculty information technology committee was in need of direction.
Asked committee to serve as the search committee to fill the vacant directorship.
Search entailed serious discussion of the nature of instructional technology—
In particular within the context of the liberal arts and CoW.
What did they want?

Results: an excellent hire

A group of faculty with a stake in the success of the new director
Demonstration of seriousness about serving the faculty
Individual projects to jumpstart new director
Handwritten thank you notes to search committee members—
Greater willingness of faculty to participate in workgroups, Searches, etc.
Full support for Moodle CMS this fall
MDID
Podcasting
Design for Kauke that represents huge step forward
Amiable resolution of troubled partnership with the libraries
We have engaged the faculty

Integration of the IT staff

If you want to implement this kind of change, you have to have people enthused about it. Offered IT management ownership and leadership opportunities. True Team.

Quarterly meetings of the IT staff over lunch. Review of past quarter's accomplishments and look ahead to next quarter's challenges.

Promotions and other rewards. Very public praise and thanks.

Professional development opportunities.

Mentoring.

IT Poorly Perceived

Acknowledge past and current deficiencies and problems.
Take ownership of deficiencies and problems. Accountability.
Go to faculty/staff offices. Listen.
Don Jacobs example.
Solicit faculty input and where practicable, act on it.
Acknowledge it. Remind them of it.
Succeed.

Imbalance Between Resources and Expectations

Benefits of being a strategic focus
Difficult choices and trade-offs
Higher Ups are unlikely to be IT specialists
Developing tools for use with president, trustees
Significant long term issue

Randoms Thoughts:

Hiring (recruiting) is absolutely critical
Empower the IT Staff
Transfer Ownership to the IT Staff
Reward the IT Staff
    Money, but also praise and recognition.
    Public, but also privately. They value time and attention.
Mentor the IT Staff.
Train the IT Staff.
Protect the IT Staff.
Celebrate success.

Large body of work on Change Management. I wish I could say that I am
    Familiar with this literature—but I can't. I can recommend
    "Managing Transitions: Making the Most of Change" by
    William Bridges. Book full of insights.
    Even systems that serve the given institution poorly have
        Defenders—people who have thrived within them.

Technology used to be perceived as liberating.
You don't have to be in the office—you can work almost anywhere.
This has changed to you can work everywhere.

Constant Reminders:

IT has no value in and of itself. Concentrate on advancing the institutional
    Mission.
View IT within the institutional context. Be a part of the wider community.
Concentrate on values.

Combat Stress

Exercise. Vacation.
"I wish I had drunk more champagne." --John Maynard Keynes