Integrating IT

Stephen Whiteside, Director
Organisational Performance & CIO,
The University of Auckland
Agenda

• Aligning IT with the University

• Integrated IT

• Adding Value
  – Core IT Service / Delivery
  – Process Management
  – Business Intelligence

• Storytelling
Excludes NZ eScience Infrastructure (NeSI), which incorporates High Performance Computing and eResearch support across Universities and CRIs
Mapping Chrysler’s Office of Strategy Mgmt

Scorecard Management
Organisational Alignment
Reviews
Strategic Planning
Strategy Communication
Initiative Management
Planning & Budgeting
Workforce Alignment
Best Practice Sharing

Performance & Risk
Business Process Mgmt
Uni Strategic Program Office
Planning Office
Finance
Human Resources

Organisational Performance
Other Service Divisions
Key Organisational Performance
Relationships with IT
Portfolio and Project Mgmt

0 Have we chosen the right project mix?
   - Categorise
   - Select
   - Prioritise
   - Balance
   - Authorise

1 Does the project still seem worth doing?

2 Does the planning point to success?

3 Are we on track / Are we ready to launch?

4 Have we delivered everything required?

5 Close and celebrate!
Project Management and Change Management

**Technical side** of moving from current state to future state

**People side** of moving from current state to future state

**Process**
- Pre-project
- Initiation
- Planning
- Executing
- Transition
- Closing

**Tools**
- Business case
- Project plan
- Work breakdown structure
- Budget estimations
- Resource allocation
- Schedule
- Tracking

**Process**
- Organizational
  - Portfolio change impact
  - Preparing for change
  - Managing change
  - Reinforcing change

**Tools**
- Impact assessment
- Stakeholder assessment
- Communication plans
- Sponsorship roadmaps
- Training plans
- Resistance management
- Reinforcement

**Individual**
- ADKAR

Prosci copyright 2009.
Prosci Change Mgmt

- **Awareness**: Of the need for change
  - “Why do I have to do things differently?”

- **Desire**: To support and participate in the change
  - “Why would I want to do things differently?”

- **Knowledge**: On how to change
  - “What additional skills do I need to do things differently?”

- **Ability**: To implement the right skills and behaviours
  - “Can I actually do things differently?”

- **Reinforcement**: To sustain the change
  - “How do I get the support to maintain a different way of doing things?”
## The Heatmap View

**Key**
- **High Impact**
- **Medium Impact**
- **Low Impact**

**Change Impact Scale**
- 0 = No Impact
- 1 = Low Impact
- 5 = Medium Impact
- 9 = High Impact

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### Organisational Change Heat Map Plot

<table>
<thead>
<tr>
<th>Type</th>
<th>Programme</th>
<th>Project</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>a) Strategic Impact Initiatives</strong></td>
<td>Faculty Administration Review Programme</td>
<td></td>
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<td><strong>Academic</strong></td>
<td>Academic Standards</td>
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<td>Academic English Language Requirements (AELR)</td>
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<td>Learning Management System</td>
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<td><strong>Business Intelligence and Reporting</strong></td>
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<tr>
<td><strong>Managing Capital Program Transitions</strong></td>
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<td>Consolidated Campus Strategy (including Newmarket/E)</td>
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<td>Engineering Building City Campus</td>
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<td>Seismic strengthening</td>
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<td>Admissions Processes and Delegations</td>
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<td>New Postgrad Taught Programme</td>
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<td>Major Research Funding Bids (CoRES, National Science Challenges etc)</td>
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**Total Change Impact**

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</table>
Planning at the Start

- Better Business Case Framework
- Investment Logic Maps
- Benefit Maps
- Benefit Realisation
UoA IT Strategic Planning

IT Service Strategies (13)

Applications Strategies (30)

IT Portfolio

Strategic Portfolio (Business Change)
# Consolidation of Portfolios

## OPCIO Strategic 2015 Portfolio as at 31 Mar 15

<table>
<thead>
<tr>
<th>Ref</th>
<th>Project Code</th>
<th>Portfolio Reporting</th>
<th>Fund Source Reporting</th>
<th>Project Name</th>
<th>Project Manager</th>
<th>Current Stage</th>
<th>2015 VC Baseline</th>
<th>2015 Actuals</th>
<th>2015 ETC</th>
<th>2015 EAC</th>
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### Learning & Teaching

- **Ref**: 733  
  **Project Code**: 824773  
  **Portfolio Reporting**: Strategic  
  **Fund Source Reporting**: Strategic - CAPEX  
  **Project Name**: Learning & Teaching Technologies  
  **Project Manager**: Tracy Skelton  
  **Current Stage**: 1. Initiation  
  **2015 VC Baseline**: $2,320  
  **2015 Actuals**: $28  
  **2015 ETC**: $2,382  
  **2015 EAC**: $2,410

- **Ref**: 1610  
  **Project Code**: 825006  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: Streaming Servers Upgrade  
  **Project Manager**: Robert Hamilton  
  **Current Stage**: Concept  
  **2015 VC Baseline**: $26  
  **2015 Actuals**: $26  
  **2015 ETC**: $2  
  **2015 EAC**: $2

- **Ref**: 1517  
  **Project Code**: 825004  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: 2015 LESU Portfolio Lecture Theatre Refurbishment  
  **Project Manager**: Aldon Hartley  
  **Current Stage**: 3. Execution  
  **2015 VC Baseline**: $580  
  **2015 Actuals**: $23  
  **2015 ETC**: $495  
  **2015 EAC**: $517

- **Ref**: 1009  
  **Project Code**: ITS / ITSPP  
  **Portfolio Reporting**: ITS / ITSPP - CAPEX  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: Lecture Theatre Recording Replacement  
  **Project Manager**: Concept  
  **Current Stage**: Concept  
  **2015 VC Baseline**: $400  
  **2015 Actuals**: $400  
  **2015 ETC**: $400  
  **2015 EAC**: $400

- **Ref**: 1581  
  **Project Code**: ITS / ITSPP  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: VC Funding  
  **Project Name**: Meeting rooms in AV  
  **Project Manager**: Concept  
  **Current Stage**: Concept  
  **2015 VC Baseline**: $100  
  **2015 Actuals**: $100  
  **2015 ETC**: $100  
  **2015 EAC**: $100

- **Ref**: 1589  
  **Project Code**: POW  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: LMS Enhancement (Cecil) POW 2015  
  **Project Manager**: Concept  
  **Current Stage**: Concept  
  **2015 VC Baseline**: $70  
  **2015 Actuals**: $70  
  **2015 ETC**: $70  
  **2015 EAC**: $70

- **Ref**: 1452  
  **Project Code**: 824198  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: Unisat Relocation - Service Reduction  
  **Project Manager**: Gaynor Hagan  
  **Current Stage**: 2. Planning  
  **2015 VC Baseline**: $70  
  **2015 Actuals**: $1  
  **2015 ETC**: $4  
  **2015 EAC**: $5

- **Ref**: 1594  
  **Project Code**: POW  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: T&L Adhoc POW 2015  
  **Project Manager**: Concept  
  **Current Stage**: Concept  
  **2015 VC Baseline**: $50  
  **2015 Actuals**: $50  
  **2015 ETC**: $50  
  **2015 EAC**: $50

- **Ref**: 1470  
  **Project Code**: 825001  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: ACT - Windows Server Upgrade - Phase 2  
  **Project Manager**: Sally Eberhard  
  **Current Stage**: Concept  
  **2015 VC Baseline**: $40  
  **2015 Actuals**: $5  
  **2015 ETC**: $55  
  **2015 EAC**: $59

- **Ref**: 1104  
  **Project Code**: 824013  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: 2014 LESU Portfolio Lecture Theatre Refurbishment  
  **Project Manager**: Aldon Hartley  
  **Current Stage**: BAU  
  **2015 VC Baseline**: -$8  
  **2015 Actuals**: $2  
  **2015 ETC**: -$6  
  **2015 EAC**: -$6

- **Ref**: 1435  
  **Project Code**: 824177  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: LESU Portfolio Lecture Theatre Refurbishment Additional Rooms Equipment  
  **Project Manager**: Aldon Hartley  
  **Current Stage**: BAU  
  **2015 VC Baseline**: $16  
  **2015 Actuals**: -$29  
  **2015 ETC**: -$13  
  **2015 EAC**: -$13

- **Ref**: 1239  
  **Project Code**: 823132  
  **Portfolio Reporting**: ITS / ITSPP  
  **Fund Source Reporting**: ITS / ITSPP - CAPEX  
  **Project Name**: Enable OGG Fisher and Paykel for Conferencing  
  **Project Manager**: Tim Chaffe  
  **Current Stage**: BAU  
  **2015 VC Baseline**: -$2  
  **2015 Actuals**: -$2  
  **2015 ETC**: -$2  
  **2015 EAC**: -$2

### Above the Line

- **Learning & Teaching Above the Line Total**: $3,510  
  **2015 VC Baseline**: $210  
  **2015 Actuals**: $62  
  **2015 ETC**: $3,435  
  **2015 EAC**: $3,496

### Research Management

- **Research Management Above the Line Total**: $1,898  
  **2015 VC Baseline**: $185  
  **2015 Actuals**: $205  
  **2015 ETC**: $1,660  
  **2015 EAC**: $1,865

---

**Note**: The table above represents the Consolidation of Portfolios as at 31 Mar 15. Each project is categorized under Learning & Teaching or Research Management, with details including project codes, portfolio reporting, fund source reporting, project names, project managers, current stages, and financial details for 2015 VC Baseline, 2015 Actuals, 2015 ETC, and 2015 EAC.
Process Management

- End to End Process
- Process Inventory
- Process Management and Automation
- Service Delivery Models
Processes and procedures
The way we get things done

The focus of this site at the moment is to provide process and procedural information in support of the FAR programme. It will be regularly updated with information relating to changes to processes and with procedural documentation as it becomes available.

About these processes and procedures...

Updates to processes are published as soon as they are ready. To help you keep up-to-date, a list of recently changed processes will be available here.

22/09/2014 Process Undergraduate Applications and Process Postgraduate Applications have been merged into one process - 'Process Applications for Admission'.

Procedural documentation will be added as soon as it becomes available. In order to get the information to you as early as possible, some documents might not be quite finalised. These will show as 'draft'.

About this site...

This is the beginning of what will be a very valuable resource for staff. It is a little rough around the edges in places but they will be smoothed out as the site evolves.

Something to note:

Search

The site search functionality available at the top right works so please use it. At the moment however, clicking on a search result will take you away from this site. This is being worked on now. In the meantime...

Tips: Opening the link in a new window (by pressing 'shift' when you click on the link) will keep this site open in the background.
Your role score is 3.6 and your role maturity is Level 3: Cross Boundary Process Management
Benchmark Score for Education: 2.5
Service Delivery Strategy

Strategic Alignment
- Organisational capabilities
- Performance goals
- Design & operating principles

Service Delivery Model
- Information
- Governance & Organisation
- Service Placement
- Process Sourcing
- Skills & Talent
- Enabling Technology
- Process Design

Service Delivery Transformation
- Organisational acceptance
- Execution capabilities
- Implementation roadmap

Source: Hackett
Business Intelligence

PARTNERSHIPS

• ITS

• Planning Office

• Service Divisions (or equivalent)

• Analyst Community of Practice
Business & Technology Value Add

- KPI and Reporting priorities
- Enterprise and functional ODS
- Metadata and data warehouse construction
- ETL and specialist support
- Data quality and governance
Business Intelligence

• The Technical layer is complex

• Good business partnerships are required in order to succeed

• Data governance is vital

• Process mgmt re data gaps
Other Linkages
Integrated IT
Faculty Administration Review

- New Faculty Organisational & Functional Structures
- Career pathways (349 to 36 roles)
- 98 end to end processes standardised
- Strengthened professional staff leadership
- Lower cost & risk transactions
- Cost savings
- Communities of Practice
- Staff Service and Transactions centres
IT Service Delivery Model Principles

Based on The Hackett Group; Service Delivery Model, Volume 14, Number 2, 2011

1. Determine services needed to meet strategic objectives.
2. Eliminate duplicated services, including infrastructure mgmt and duplicated or poorly maintained local applications.
3. Simplify desktop and local application design and delivery. Implement best practice across the University.
4. Standardise service processes, and desktop design, delivery and support. Reduce manual effort and errors.
5. Automate monitoring, patching, remote desktop management.
6. Deliver standard service through best service points.

Strategic alignment

Eliminate

Simplify

Standardise

Automate

Consolidate, rightsource

Coordinate

Self service knowledgebase

Shared Transactions Centre

Staff & Student Service Centres

Face to Face Service

Service Delivery Options
Standardisation of Roles

• End User Support (consistent with Central IT)

• Research Support Specialist

• Applications Support
• IT Community of Practice

• End User Support Community of Interest

• Applications Support Community of Interest

• Reporting Analyst Community of Interest
Challenges ....

• Integration of New Staff Service centre

• Moving from local informal service, and changing behaviour

• Consistency of service (charter / standards)

• Standardising communications and reporting

• Perceptions around Faculty Admin Review
Storytelling & Effective Communication

• Articulating benefits

• Contribution to Business Cases

• Storytelling and communications skills

• Connection to purpose and strategy
**Effective Communication**

<table>
<thead>
<tr>
<th>Type of Impact</th>
<th>Change Impact Scale</th>
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<tbody>
<tr>
<td><strong>Informing</strong></td>
<td>Raising Awareness</td>
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<tr>
<td></td>
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<tr>
<td><strong>Discussion</strong></td>
<td>Raising Understanding</td>
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<td>3</td>
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<tr>
<td><strong>Dialogue</strong></td>
<td>Building commitment and stimulating behaviour change</td>
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<td>8-10</td>
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</tbody>
</table>

Source: Talking Business – Making Communications Work, Clutterbuck & Hirst
Four Pillars of Communication

Communication competence

- Clarity of Purpose
- Information sharing
- Effective Interfaces
- Leadership behaviour

Source: Talking Business – Making Communications Work, Clutterbuck & Hirst
Our Storytelling Focus

• Change Management
  – Prosci ADKAR Model

• Administrative Leadership Program
  – Connection to Purpose and Strategy

• Human Synergistics
  – Culture coach

• IT Service Strategies
  – Storytelling
• Partnering with the University

• Integrated IT

• Focus on BI and Process

• Storytelling
Questions?