

Start to finish

Navigating the course of technology-enabled
change in higher education



Contents

- Foreword 1
- Executive summary 2
- Common pitfalls 4
- Sponsorship 6
- Involvement 8
- Governance 12
- Funding 16
- Talent 18
- Change is possible 22
- About our Higher Education practice 24
- Contacts 25

Foreword

Deloitte is pleased to present our point of view on technology-enabled change in higher education. Our perspective is based on many years of helping clients execute and support their change initiatives at institutions throughout North America and around the world.

This report discusses the rationale for change – and provides a detailed look at the primary causes of failure, including:

- Inadequate sponsorship and leadership
- Limited involvement from key stakeholders
- Improperly structured governance
- Funding limitations
- Improper staffing

The analysis offers practical insights to help schools overcome these challenges and achieve their objectives for change and growth. In particular, it is designed to help executives of higher education institutions self-assess their organization so they can identify and avoid the most common pitfalls.

If your organization is struggling to keep up with the demands of today's tech-savvy students, please read on. We hope the insights in this report will spark a healthy debate and inspire your organization to tackle whatever challenges it might face.



Handwritten signature of Bruce Laco in black ink.

Bruce Laco
National Technology Partner
Deloitte



Handwritten signature of Louise Upton in black ink.

Louise Upton
National Higher Education Partner
Deloitte



Handwritten signature of Brian McKenna in black ink.

Brian McKenna
Partner
Deloitte

Executive summary

Introduction

Over the past decade, a sea of change has been occurring within higher education. Competition for students is high, as students are becoming more discerning about the schools to which they apply. Institutions accustomed to top choice status can no longer feel secure in their market position, while schools that have struggled for recognition in the past have an unprecedented opportunity to improve their standing.

Schools now compete in a global market for faculty, students and staff and must expand their programs and service levels accordingly. For most institutions, simply attracting local or regional students is no longer enough. Enrolling students from across the country and around the world can improve a school's brand and provide the entire student base with a more diverse and fulfilling experience.

To attract students in this new environment, schools must become more student focused. This transformation typically requires significant improvements to processes, technologies and organizational culture. For many years, higher education institutions have lagged behind in their adoption of technology. Although many have made significant investments in technologies that enhance the academic experience, investments in administrative systems have generally not kept pace.

Today's students are tech-savvy and demanding. They have grown up in the age of technology and they expect fast and easy access to information and services. As a group, they have little patience for excuses or standing in line, and will not tolerate systems and processes that are inefficient, inflexible or incapable of providing timely and accurate information. Students, faculty and staff want to be on-line, not 'in-line'. To compete effectively, schools must rise to meet this challenge. And they must do so while operating in a fiscal environment of cost pressure and reduced funding.

Technology-enabled change

A school's administrative systems are often the first – and most frequent – touch point for interacting with students and prospective applicants. Upgrading and integrating these systems can improve the student's experience, increasing a school's appeal in the marketplace. It can also make life easier for administrators and faculty and serve as a catalyst for continuous improvement across the institution.

Implementation of an Enterprise Resource Planning (ERP) system is often a key driver for technology-enabled change throughout the organization. However, other institution-wide technology projects also can have a significant impact.

The potential for organization-wide technology-enabled change is huge. In many cases, it can establish new processes to replace those that have grown old and inefficient. Also, it can help accelerate cultural change, which can give organizations that execute well a competitive advantage in the marketplace to attract high quality students, faculty and staff – as well as increased funding.

“Having experienced rapid academic growth at Ryerson, we need technology platforms that enable us to meet and exceed our goals.”

Dr. Alan Shepard
Provost and Vice President Academic, Ryerson University

Why change?

Students are beginning to view ease of electronic access as a criteria in selecting their school. Although they still primarily choose a school for its programs and reputation, today's students also expect schools to use technology to enhance the experience and education for which they are paying. Yet, in spite of these rising demands, many institutions continue to scrape by with outdated technology solutions that are often older than the students themselves, while others struggle to leverage the technology investments they have already made.

Administrators also require top technologies to do their jobs more effectively. In order to advise students and manage curricula in a complex environment, technologies such as email, self service portals and other communication tools are essential. Such technologies should be seamless and fully integrated, providing users with convenient one-stop access to critical information. These integrated solutions can trigger a fundamental shift in the way that administrators think about and use technology.

To be a top tier school you need top tier technology; however, many institutions have been frustrated by their past efforts to change. They need a new approach. This report looks at the most common barriers to technology-enabled change, and offers practical insights to help institutions overcome them.

Common pitfalls

Every institution has a distinct character and tradition. This uniqueness has tremendous value, helping a school distinguish itself in the marketplace. But when it comes to technology-enabled change, schools don't really distinguish themselves at all, in that they tend to make the same kinds of mistakes.

1. **Inadequate sponsorship and leadership.** Inadequate or invisible support from the top undermines a project's credibility. Insufficient authority results in an inability to resolve disputes across organizational silos.
2. **Limited involvement from key stakeholders.** The IT group develops solutions and plans without actively involving key stakeholder groups (faculty, administrators and students). Stakeholders reject the improvements because they don't feel a sense of ownership.
3. **Improperly structured governance.** The institution fails to define how decisions will be made or who will make them. The result is a consensus-driven approach that can lead to endless debates and ineffective solutions.
4. **Funding limitations.** There is not enough money to complete the project or sustain the improvements. Administrative systems often face additional funding challenges because they do not contribute directly to the classroom. Some groups may use funding to exert an unfair amount of influence.
5. **Improper staffing.** The institution cannot afford to assign its most talented people to the project. Often there are simply not enough people to staff the project adequately or to backfill for people assigned to the project.

The outcome? Missed deadlines. Budget overruns. Finger pointing. And performance that falls far short of expectations.

The consensus trap

Many of the problems encountered during a technology-enabled change are natural by-products of the way that universities, colleges and other academic institutions are structured. Typically, each department operates in autonomous silos that make their own decisions. Moreover, higher education institutions often pride themselves on being inclusive but cautious when it comes to making decisions, giving each department veto power over the final outcome. The result is often a long, expensive change initiative and a solution that doesn't work well for anyone.

To be effective at technology-enabled change, institutions must establish and follow appropriate decision-making mechanisms and processes – including empowering team members to make decisions. A new technology is a chance for the institution to improve service to its constituents (students, faculty, staff and alumni). But without the right decision-making processes, an institution is likely to find itself doing things the 'same old way'.

“Universities strive to achieve cross-campus consensus around system implementations to avoid fallout from any one group. However, the goal of achieving 100% support may prove unrealistic, in which case it is essential that a robust decision making framework be in place.”

Andrew Simpson
Vice Principal, Finance and Administration, Queen's University

Avoiding the pitfalls

“Never underestimate the power of a few committed people to change the world. Indeed, it is the only thing that ever has.”
Margaret Meade.

Change is possible. It has been done and it can be done. However, it isn't always easy – especially when many of the challenges are institutionalized within existing organizational structures and processes.

Our analysis of effective and ineffective technology-enabled change initiatives yielded insight into how institutions can execute such initiatives more effectively – helping to deliver more value for the organization and increasing the chances for achieving their desired results. These insights apply to technology-enabled change in higher education, regardless of the specific technology being deployed or the sponsoring function within the institution.

Although these insights are essential for achieving desired results, they do not guarantee it. Every change initiative involves a certain amount of risk and requires tough questions to be asked. Achieving desired results stems from answering the tough questions and effectively managing the risks.

No one starts out intending to fail, particularly on initiatives they have fought long and hard to get underway. This report offers practical tips to help institutions avoid the most common project pitfalls and increase their chances for a positive outcome.

Sponsorship

Leading from the top

Effective change begins at the top. Visible and sustained support from leaders sets the right tone and gives the initiative credibility. It also communicates to faculty, students and staff the importance of the change, and is a key way to break down silos and get people from different departments working together. Without the right sponsorship, an initiative can easily lose direction or run into organizational and political obstacles that stop the effort dead in its tracks. After all, if the leaders of the institution don't actively support the change initiative, why would anyone else?

Deloitte perspective

Every change initiative needs a primary sponsor – someone who can champion the cause and make tough decisions. This person's role includes removing organizational and political barriers, making sure that the appropriate executive oversight is in place, requiring that the effort be tied to at least one strategic initiative and acting as a beacon for change.

In addition to the primary sponsor, other leaders within the institution can also provide important sponsorship by serving on the steering committee or by championing the initiative within their departments.

At a pre-eminent US university, accountability for the change initiative at the highest levels within the institution was not clear. As a result, the program essentially stalled due to lack of understanding of roles, responsibilities and decision-making processes. Developing an accountability framework, identifying a new sponsorship team, and clearly communicating to the institution about the new team's roles and responsibilities helped restore the project's momentum.

Keys to success

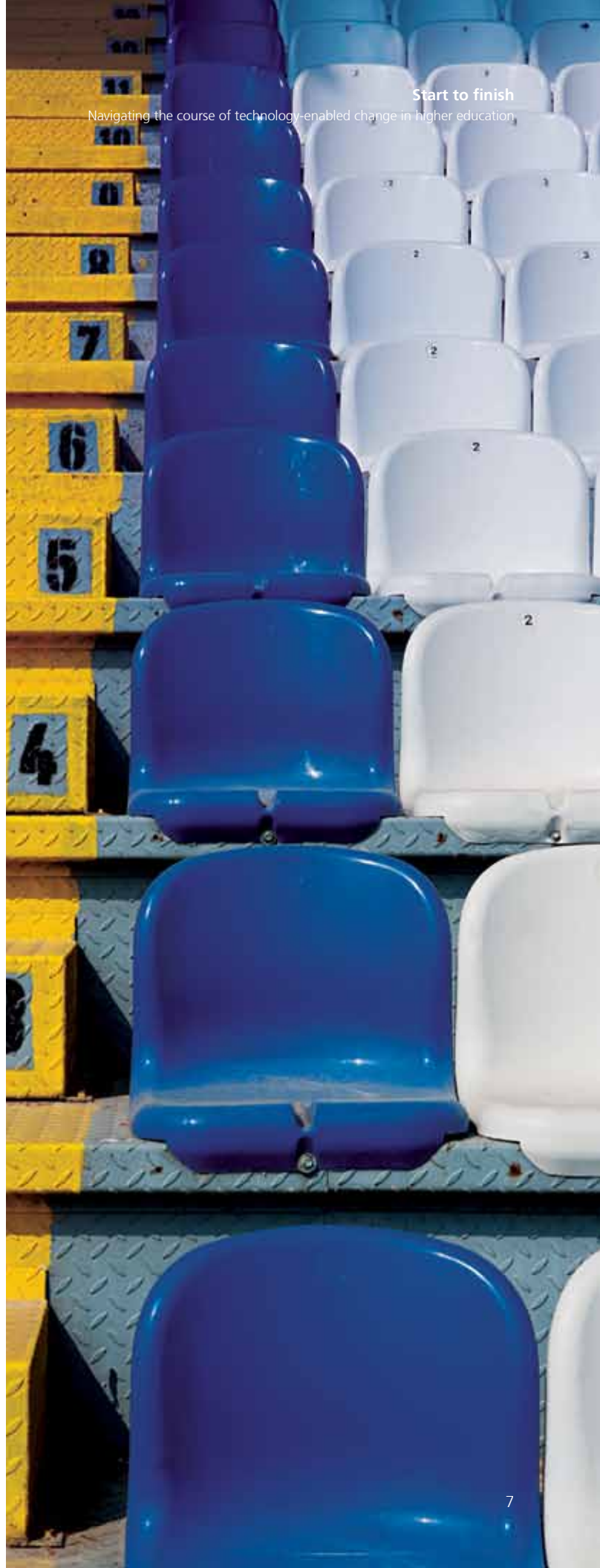
Choose the right sponsor. A good project sponsor is well respected within the organization and is seen as a visionary. Ideally, the sponsor also has formal authority across all of the affected areas. For a major institution-wide initiative, the project sponsor is often the leader of the institution (e.g. President, Chancellor) or someone the leader personally designates to guide the initiative on his or her behalf.

Make the case for change. In order to secure the right sponsorship, prospective sponsors need to be convinced that there is a compelling case for change. They also need to understand how the change relates to things they care about or are responsible for. Finally, they need to believe that change is possible and that a team can be built to make the vision a reality.

Assign clear responsibility. The project team and institution must clearly understand who has final responsibility and accountability for the initiative. Without this clarity, it is difficult or impossible to resolve contentious issues. This is especially true in cases where co-sponsors exist.

“The result of key university leaders not being part of the planning for a major system implementation, can be disastrous. It is therefore important to achieve widespread understanding and commitment to the project.”

Andrew Simpson
Vice Principal, Finance and Administration, Queen's University



Involvement

Getting key stakeholders involved

Although technology-enabled change starts at the top, it can't be achieved simply by executive edict. Achieving desired results requires active involvement and support from many parts of the organization.

Technology-enabled change initiatives often overlook the human element, focusing the bulk of their attention on systems and technology. But, from our experience, people issues, such as organizational politics and resistance to change, are the main reasons so many technology projects fail.

Most institution-wide initiatives require involvement and support from three main stakeholder groups:

- Faculty
- Students
- Administration (including the IT function)

Within each of these factions, important sub-groups must also be considered. For example, the faculty typically comprises a wide range of academic departments with varying needs and opinions. Similarly, the administration may include a variety of isolated organizations such as finance, HR, IT and the registrar's office. All of these affected groups must be actively engaged. At most institutions, these departments are accustomed to operating autonomously, which means that getting them to collaborate – and establishing a sense of involvement and ownership – requires a conscious effort.

Deloitte perspective

Actively engaging key stakeholder groups is crucial for effective change. It can also provide a strong foundation for sustained performance and continuous improvement. So how do you do it?

Within higher education institutions, a comprehensive and structured approach to managing change is a required (and demonstrated) way to overcome resistance and increase the chances of a positive outcome. Rallying a diverse group of key decision makers around a specific call to action is of huge importance to effect and sustain the change.

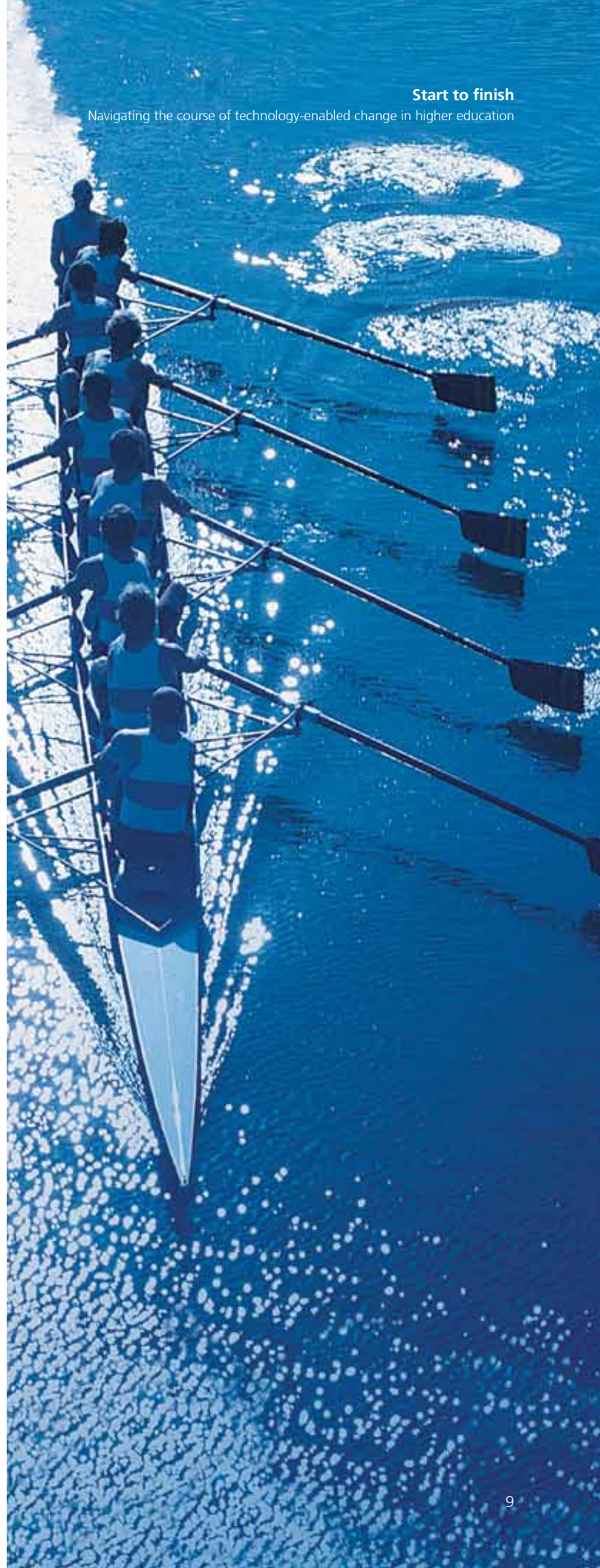
Dan Cohen, a Principal in Deloitte Consulting LLP's Change Leadership service line, collaborated with John Kotter of Harvard Business School to write *The Heart of Change*. The book (and related field guides) are based on Kotter's theoretical model and Deloitte's real-world experience implementing thousands of institution-wide change programs.

According to Dan and John, people change their behaviour because they are shown a truth that influences their feelings. This is particularly true for large-scale organizational change that combines new organizational behaviours with new operating processes and new technologies. In their book, they describe an eight-step process for effective change:

1. **Create a sense of urgency** so that people start telling each other "Let's go, we need to change things!"
2. Pull together a **guiding team** powerful enough to guide a big change, which could include the lead academic resource (Provost), the head of IT and the Chief Financial Officer
3. Create clear, simple, uplifting **visions** and sets of strategies
4. **Communicate** the vision through simple messages sent through multiple channels so that people begin to buy into the change
5. **Empower** people by removing obstacles to the vision
6. Create **short-term wins** that provide early momentum
7. Maintain **momentum** so that wave after wave of change is possible
8. Make change stick by **nurturing a new culture**

“Both staff and administrators were more willing to participate as they saw the direct benefits of being actively involved in the process. At times, overcoming territoriality and getting people to work together was a challenge. In the end, encouraging the team to keep their university hat on and not just represent their specific departments was key to the project’s success.”

Steve Hewgley
Associate Provost, Pepperdine University



Start to finish

Navigating the course of technology-enabled change in higher education

Keys to success

Focus on people, not just technology. Resistance to change and other people-related issues are the most frequent causes of project failure. People should be the top priority, not just an afterthought.

Get key stakeholders actively involved. People are much more receptive to change if they are part of the process. Getting key stakeholders actively involved early and often can produce better, more informed solutions. Even more important, it can create a sense of ownership that makes changes more likely to stick. This early involvement can include helping set strategic priorities, identifying requirements and developing a program delivery framework.

Cast a wide net. According to Dan and John in *The Heart of Change*, “In successful change efforts, the visions and change strategies can’t stay locked in a room with your team. They must be communicated with as many people as possible, who in turn must buy in. The goal: to get as many people as possible acting to make the vision a reality.”

Establish a credible steering committee. To work together effectively, the key stakeholder groups of faculty, student and administration must be represented on the steering committee, and must focus on what’s most appropriate for the institution, not just their own area.

On a change initiative at the University of North Carolina - Chapel Hill (UNC-CH), several sub-groups with direct influence on the project have been established. These include an academic subcommittee, reporting sub-committee, school coordinators (project working group with representatives from UNC-CH’s undergrad, graduate and professional schools), change management advisory board and a group representing the students. Involvement and support from these diverse groups is critical to achieving their desired results because it reinforces the project’s positioning as a university-wide initiative, not just an IT project.

Case study: learning from the past

The following two projects demonstrate the value of actively managing change. Both were conducted at the same institution but with very different approaches – and very different results.

The first was a Student Administration Systems implementation. The organization put a steering committee together, identified requirements and went about implementing the software. Problems included:

- Lack of organization-wide engagement in creating the vision and case for change
- Lack of organization-wide engagement in developing requirements
- Uninformed assumptions about the most effective way to train and support end users

The initiative received poor press, both at the time of the implementation and for years afterward. The product didn’t live up to the expectations of the end user community, the support levels were less than desirable, and users – including faculty, students and staff – felt they were poorly prepared to deal with the technology that was now at their fingertips.

On the second project, which is an upgrade to the system implemented by the first project, the institution has clearly learned from its past. Specific focus areas this time around include:

- Demonstrable senior executive commitment
- Active organizational engagement and buy in
- Development and execution of a detailed backfill plan
- An improved collaboration with the systems implementer
- A clearly articulated scope of work and anticipated benefits

This initiative was much more effective because the institution’s leaders clearly acknowledged the failings of the past and matched words with deeds through improved organizational engagement. They clearly understood the case for change, the benefits the technology would deliver and the support mechanisms that would be needed when the upgraded system was deployed. They also had strong support from the end user community.

Aligning technology-enabled change with the direction of the institution

Technology-enabled change must align with the current and future needs of the institution. It should not be developed in a vacuum. One key decision that hinges on the direction of the institution is whether to centralize or decentralize the technology.

Many departments doubt that a centralized IT organization can meet their individual needs. They believe IT is ill-equipped to drive large-scale change initiatives, and as a result tend to be skeptical or resistant to any efforts at technology-enabled change. This has led some institutions to move away from centralized technology implementations.

However, amidst growing concerns about security, identity management and institutional branding, many schools are being forced to reconsider the decentralization issue.

It's not just a question of centralizing or decentralizing IT activities such as system design, implementation and support. Technology choices also have a direct impact on operational activities such as decision-making, data entry, data processing and reporting.

Centralization can take many forms. Three specific points on the continuum include:

- Completely centralized – the head office or a central function such as Human Resources, has total control. They set the standards, own the process and execute against it. Local units have little or no involvement.
- Completely decentralized – local units own the processes and operate autonomously. They set their own standards and execute against their process from within their own unit.
- Center-led – in a centrally led organization, the central function sets the standards and owns the process; however, they give local units the capability of executing against that process within the pre-defined framework.

When pursuing technology-enabled change, it is important to understand the organization's past, present and future direction with respect to centralization. New technologies and processes must align with and support where the institution is headed.

“To achieve the highest levels of student engagement and success during times of rapid growth and technology change, we must protect our core values of having a diverse, respectful and student-centered environment and to do this, we must ensure that faculty, students and staff are actively committed to the technology changes required to support growth.”

Dr. Alan Shepard
Provost and Vice President Academic, Ryerson University

Governance

Defining how decisions are made – and who makes them

Broad involvement should not be confused with consensus decision-making. As noted earlier, initiatives that try to achieve a consensus by pleasing everyone generally end up producing watered-down solutions that don't really work well for anyone. This is a common problem at many institutions.

What's the difference between involvement and consensus?

With consensus, every group participates in the decision and has the power to veto things they don't like. With involvement, groups provide input – and their needs and opinions receive careful consideration – but they don't make the final decision. This might seem like a small distinction, but it has big implications.

For institution-wide change initiatives in higher education, a consensus-driven approach seems to be the norm. Because individual departments are used to operating autonomously, there's often an unspoken threat that they will "take their marbles and go home" if they encounter something they don't like. The result can be an endless stream of compromises that cause a project to run over time and over budget, while delivering a solution targeted at the lowest common denominator.

Deloitte perspective

A key way to overcome this natural tendency toward consensus is to clearly define an alternative approach to decision-making. That's where "governance" comes in. Governance clearly defines how decisions are made and who makes them.

Although the name might suggest that Governance only applies to those at the top of the organization, good governance has a place for all levels within a project – and at all stages of the project lifecycle, from strategy formulation through execution and into sustainment.

Governance is traditionally defined by the project management office, guided by the steering committee and confirmed by the project sponsor.

Objectives of governance:

- Define roles and responsibilities for decision-making
- Establish clear reporting relationships
- Define a process for managing and mitigating project risks
- Identify standards for managing software configuration decisions and changes
- Establish a process for tracking and reporting project costs against budget
- Define status reporting and steering committee deliverables
- Define a process to identify, escalate and resolve critical issues
- Establish a regular schedule, agenda and objectives for meetings
- Develop a simple process for managing project scope, schedule and resources
- Plan and execute project communications
- Define the process for bringing the project team on board

Good project governance seeks to replace an ineffective and disorganized consensus-driven approach with a clear framework for making tough decisions and keeping a project on track. It focuses on doing what's better for the institution as a whole (the greater good). Also, it gives project leaders such as the Project Management Officer (PMO) and steering committee the authority to break logjams and keep things moving forward.

Effective governance defines clear accountability and decision-making rules, giving the right individuals the authority and tools to make decisions on a timely basis. At the same time, it can provide a safe haven for new (or even radical) ideas, encouraging people to take risks and push the envelope.

When establishing the team, project executives should seek out individuals who have demonstrated the ability to think outside the box and take risks. Too often in higher education, individuals are concerned about making the wrong decision and as a result are either slow to make a decision or don't make a decision at all.

Without good governance, a project is likely to be ill-defined and poorly executed. Benefits won't be clearly articulated, and therefore will probably not be achieved or sustained. Instead, the organization will likely fall back into the old way of doing things. Never underestimate the power of the status quo.

Start to finish

Navigating the course of technology-enabled change in higher education

Keys to success

Establish governance at the outset. Laying down the law at the beginning of the project helps to avoid conflict down the road. Make critical and high-impact decisions up front. Provide a clear framework that people must follow when making decisions and executing project activities (e.g. requiring the use of strategy documents to drive detailed design and software configuration).

Create a safe environment for innovation. Concerns about organizational politics and avoiding conflict can slow things down and compromise the quality of the solution. One way to tackle this problem is to fill the steering committee with leaders who can set aside their personal agendas and focus on what is most appropriate for the institution as a whole.

Provide easy access to decision-makers. Put decision makers on the team or provide mechanisms so that the project team can quickly obtain necessary decisions.

Communicate. Clear communication is necessary to articulate the reasons for change, the status of the project, the importance of good governance, and the roles and responsibilities at each layer within the governance structure. Poor communication undermines the credibility of the project (and everyone involved with it). It also leaves the door open to rumours and innuendo, which can have a devastating impact on morale and productivity.

Test it before you need it. The governance structure needs to be more than words on a page. Putting it to use in the early stages of a project can help determine whether it is functioning effectively, so that when tough decisions arise, a trusted governance structure is already in place. A governance structure that has been used to dealing with 'easy' challenges will typically fold when confronted with a tough 'game-changing' decision.

Case study: improved governance

Governance can be an extremely powerful tool in enabling change. However, a number of key elements must be planned for and carefully communicated to facilitate achieving desired results.

A university in the United States was in the process of planning for a large system replacement project and had formed a steering committee that was both eager and engaged. This group had helped select the new technology solutions and implementation advisor, and was charging forward with the work. Unfortunately, there were a couple of major problems. First, very few of the steering committee members had any experience with a large-scale technology initiative. Second, the committee's roles and responsibilities changed significantly as the project moved into the implementation phase, and many members were not sure what they were supposed to be doing.

To address these problems, each person's role was clearly defined, and the roles were reiterated at every steering committee meeting. Also, each member of the committee was assigned responsibility for a specific set of tasks.

A structure for effective governance

An effective governance structure enables clear and rapid decisions. Figure 1 shows a typical structure for making critical decisions and escalating critical issues. Accountability initially resides with the team leads and stream leads. If an issue cannot be resolved or a decision cannot be made at this level, then an escalation process is initiated.

Team and stream leads have responsibility for participating in project planning, making key decisions and providing a framework for lower level decision-making within the defined scope of the project. Decisions or actions that affect scope, timelines, budget and risk must be escalated to the project manager level.

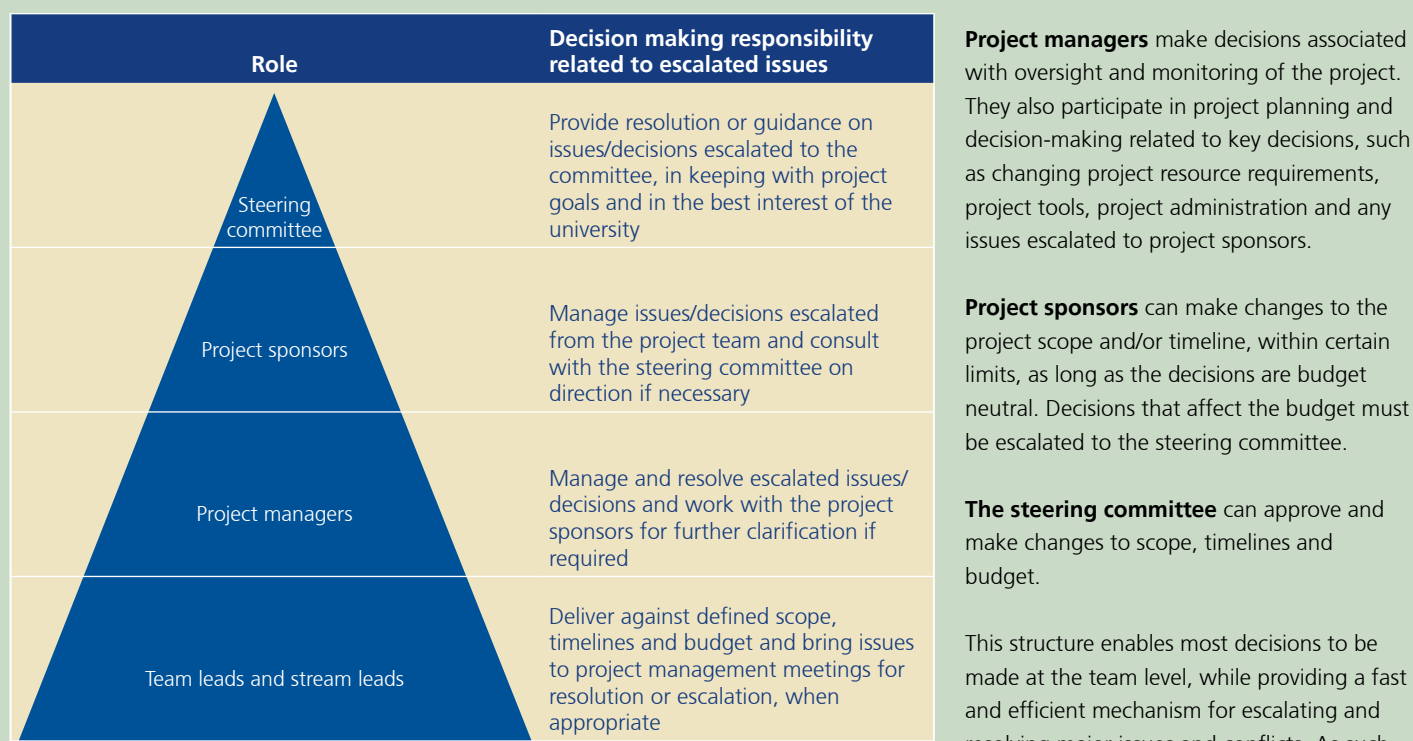


Figure 1 A time-tested governance structure

Funding

Finding the money to achieve and sustain large-scale change

Without funding, an institution-wide change initiative may never get off the ground. Funding enables resources to be dedicated to a project and backfilled as appropriate, equipment and software to be purchased/leased, consultants to be engaged, working space to be secured and fixtures and fittings to be put in place. Funding also demonstrates commitment (and often board support) for the initiative. In essence, the organization is putting its money where its mouth is. Without adequate funding, there is no evidence of such a commitment. There will be no project, no momentum and no change.

Of course, finding the money to achieve and sustain large-scale change isn't easy. In most cases, funds must be gathered from a variety of sources. And often, the required investment must make up for a lack of investment in the past, which increases the size of the immediate funding hit.

“Our VP, Finance and Administration, has observed that the main problem isn't lack of funding – it's lack of planning. The essential point is that university funding is very tight, which makes it especially important to plan and articulate funding needs with great care. For example, we are currently implementing a new system for cooperative education and career services. To ensure adequate funding for this 3-year effort, we drew up the budget more than a year ago.”

Dr. Alan George
Associate Provost for Information and Technology,
University of Waterloo

Deloitte perspective

Funding is critical for projects of every shape and size. In fact, small projects can run into trouble just as easily as big projects. Projects require funding and governance appropriate to their size, impact, complexity and risk.

The source of funding is an important consideration for organization-wide initiatives. The details must be carefully considered and articulated before being accepted. Those that hold the purse strings may be perceived as having undue influence on the direction of the initiative. Using multiple funding sources helps counteract this perception by facilitating a funding model in which a variety of stakeholders have 'skin' in the game. In certain instances it might even make sense for the institution to hire services providers (such as systems integrators) on a contingency basis, further spreading the responsibility and risk.

Funding plans must also consider 'life beyond the project' to facilitate ongoing upgrades, sustained performance and continuous improvement after the project is complete.

Our practitioners have seen institutions use a variety of different funding mechanisms, from complex 'sinking funds' to a simple 'tax' on student fees that was both highly effective and highly unpopular.

Sinking funds can be used to sustain funding for a significant technology initiative. These funds provide a voluntary, internally administered source from which to fund 100 percent of the initial project cost, along with ongoing support for a defined period of time. Participating departments commit to making specific contributions to the fund on a regular basis, so the project sponsor and team don't have to keep going back and asking for more money. This helps maintain sufficient funds for the project, and helps the institution sustain acceptable investment earnings over the time horizon of the project and life of the fund.

Keys to success

Get the funding right the first time. Too often, project leaders don't ask for enough money in the beginning and have to go back for more. This can undermine their credibility, and often leads to sacrifices in quality and service. Planning is of fundamental importance in securing the right funding. Project leadership must perform due diligence to determine that funding requests are well substantiated and broad enough to account for unforeseen circumstances.

Follow the rules. At most institutions, there are clearly defined processes for securing money, authorizing spending and reporting against spend. These processes should be strictly adhered to unless project-specific changes are approved by project leadership.

Manage the fund appropriately. Securing the money is only the beginning. A project can expect to have many people looking over its shoulder while the money is being spent. Plan carefully and keep track of spending.

Be creative. Sinking funds and other innovations can make it easier to sustain funding.

Use funding as both a carrot and a stick. Funding can be used as a governance tool to help determine that the goals, timelines and scope of the project are adhered to. This might take the form of a shared contingency that gives all parties (including the system integrator) a financial incentive to come in at or below budget while delivering the expected scope and benefits.



Talent

Achieving the right results requires the right people. But how do you get them?

The results of a project are closely tied to the quality of people on the team. The stronger the talent, the better the results. No surprise there. So why is it that so many project teams are filled with people who have nothing better to do? The answer, of course, is that the most appropriate people for the project are also the ones who are most likely to be indispensable to daily operations.

Many projects fail because the team isn't staffed with qualified, dedicated people. In some cases, the people simply don't have the right skills or backgrounds. In other cases, the people have the right capabilities, but are expected to contribute to the project while continuing to fulfill their normal, day-to-day responsibilities. Forcing people to do two jobs is not a sustainable approach – particularly in the current environment, where top talent is a precious resource that needs to be carefully managed.

“When assembling the core implementation team, our message to the dean was: ‘If you can afford to lose the person, you aren’t giving us the right person.’ Talent is definitely a challenge as you attempt to provide the best staff for implementation, while maintaining service levels and quality of work in individual departments. For delivery success you need to budget for enough resources, and give individual departments flexibility in using backfill dollars to hire and provide incentives to get the right people in place.”

Steve Hewgley
Associate Provost, Pepperdine University

Deloitte perspective

Getting key people from the organization involved in the project creates a greater sense of ownership, helping to overcome resistance to change. Hands-on involvement in design, development, configuration and testing also makes the results more sustainable by giving people in the organization valuable experience, and promoting knowledge transfer from outside knowledge sources.

On the other hand, a project staffed with the wrong people is in trouble before it even begins.

What can institutions do to avoid the problem?

One demonstrated technique is to develop a broad resource plan that covers the project from start to finish. The resource plan provides a detailed picture of the types of skills and quantities of resources needed in every phase of the project. This gives the organization time to prepare for the temporary reassignment of critical employees. With enough advance warning, it is usually possible to train one or more people to “backfill” for a key resource.

Another effective technique is to avoid making other changes to the affected parts of the operation until the project is complete. Hitting an organization with a shotgun blast of change initiatives can increase stress and undermine productivity, making it hard to maintain day-to-day operations – particularly in the absence of key staff.

An organization is off to the right start if the following elements are in place:

- The right number of resources assigned to the project
- The right resources assigned to the project
- Appropriate backfill for assigned project staff
- A staffing plan that recognizes the inevitable peaks and valleys that occur during and after a project (parallel systems, additional support at go live, legacy system retirement, etc.)

Keys to success

Assign highly talented people to the project. A major change initiative can determine your operational effectiveness for years to come. Allocating some of your highly talented people to the effort is a smart long-term investment.

Don't expect people to do two jobs. Backfilling for project resources accomplishes two things. First, it helps to maintain the quality of daily operations. Second, and even more important, it reduces the chance of burning out these highly talented people.

Make a resource plan. A broad resource plan gives the organization more time to train or recruit replacements or to make other staffing arrangements to fill critical gaps.

Plan for the obvious. Take vacations and statutory holidays into account. Expect normal absences due to illness.

Create a separate workspace. Providing the project team with its own dedicated workspace promotes camaraderie, communication and collaboration. Getting team members away from their regular offices also helps prevent them from getting sucked back into their daily responsibilities.



The identity issue

Identity management is a major challenge for institutions of higher learning. The problem has two dimensions. The first is validating a person's identity (knowing if they are who they say they are) to prevent unauthorized access to sensitive information. The second is creating a single, accurate data view of each person so the school can serve that individual more effectively and efficiently.

Many institutions still struggle with both of these dimensions. Meanwhile, the pressure to solve the problem continues to mount. Proliferation of network applications and web-based content is increasing the risk of unauthorized access. Access methods and access points are becoming more complex and varied. Privacy laws and other regulations are raising the bar for compliance. And tech-savvy students have ever-increasing expectations for convenience and privacy.

The potential consequences are also rising. Loss of customer data can tarnish a school's reputation and expose it to significant liability. Moreover, recent events such as the Virginia Tech shootings and Hurricane Katrina have shown how important it is for an institution to know where its people are – and how to reach them in a hurry.

Understanding the problem

Today, most institutions operate their systems as isolated islands that make it difficult or impossible to standardize and control information access – or to create an accurate and consistent view of an individual. This silo approach might have been good enough in the past, but not anymore. Top priorities now include:

- Raising security requirements for new content and services (often to levels not currently available within the institution)
- Improving the speed and efficiency of adding and removing users
- Maintaining the control and confidentiality of users
- Controlling costs while dealing with a growing number of users, systems and passwords

At the University of Waterloo, identity management is a high priority. The school is currently in the process of replacing its current homegrown system with a commercial solution that will provide control and differentiated access for different types of users. The next big step will be to create an integrated view of each user by combining information from a number of different systems.

The solution

An integrated approach to identity management can help address these challenges by providing consistent access control and consolidating multiple instances of a user’s identity into a single, virtual identity. This makes it easier to manage multiple identities across the organization, and enables processes, policies, and applications to use identities in a consistent way.

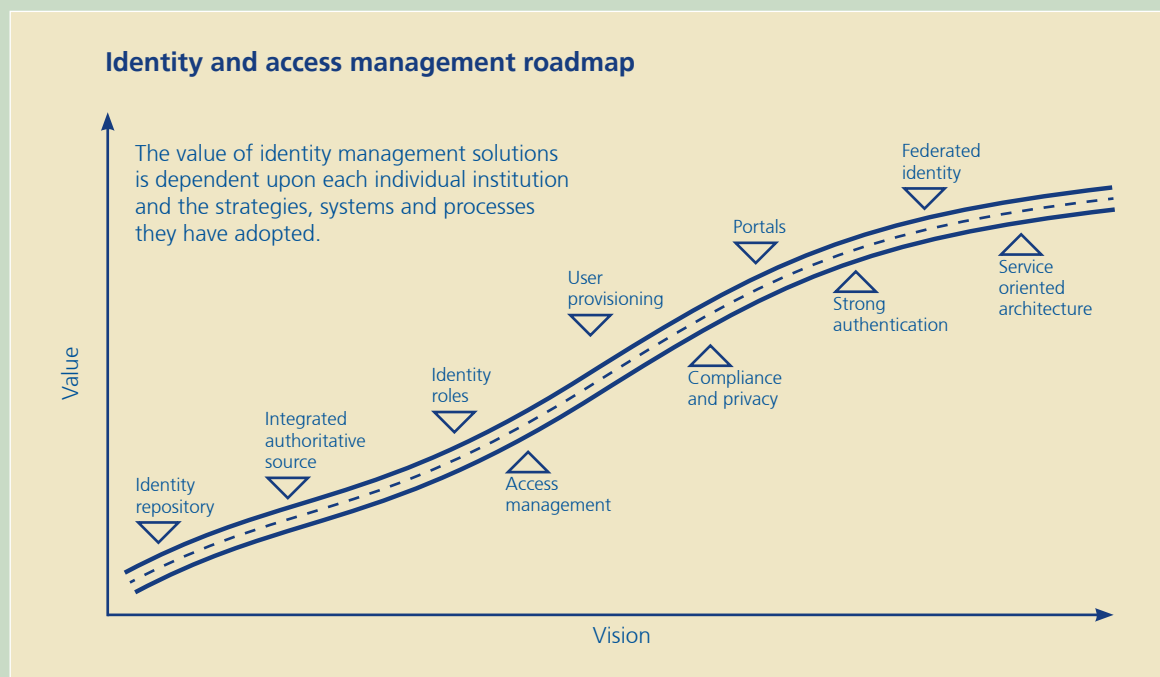
Achieving world-class identity management is a multi-step process that requires a broad set of solutions.

Each of these solutions creates tangible value for the institution. However, the most value can only be achieved when all of the elements are implemented.

Bottom-line benefits

Improved identity management can deliver a wide range of benefits. For students, it can improve their overall experience and reduce the risk that their data security will be compromised. For faculty, it can improve productivity and reduce their need to call the help desk.

On the administrative side, there are even more possible benefits. These include: reduced costs for everything from technology and help desk to general administration and HR, greater compliance with privacy and security laws, improved management capabilities, consistent policy enforcement and increased focus on customer service.



Change
is possible

But the first step is to change your perspective

Change can be done, it has been done, but it isn't easy. Technology-enabled change affects an institution in ways that bear little resemblance to the day-to-day activities to which people have become accustomed. Instead of revolving around individual schools, classrooms and students, these initiatives demand a horizontally integrated effort that cuts across organizational boundaries. This requires different capabilities and a new approach.

By acknowledging the challenges and applying time-tested techniques to tackle them head on, any institution can dramatically improve its chances for effectively implementing technology-enabled change. The result? A clear advantage in the marketplace – and in the classroom.

Start to finish

Navigating the course of technology-enabled change in higher education

About our services to Higher Education

Deloitte's Higher Education professionals offer a full range of technology-related consulting services to schools, colleges and universities around the world.

Our services span the entire project lifecycle: advise, build, deliver and manage. Specific offerings include services related to: long-term planning; technology cost reduction; implementation, upgrade and improvement; and application management. Proprietary tools such as our Total Campus methodology and Enterprise Value Map for Higher Education enable us to help our clients to plan and execute projects efficiently and effectively, allowing a school to focus on serving its students and faculty.

In addition, more and more Higher Education clients are asking us to help them make change possible. Schools reach out to us because of our reputation in the industry, the strength of our people and the unmatched value we deliver through executable advisory services. We help these institutions in their efforts to develop an institution-wide blueprint for technology-enabled change – or establish a new roadmap to capture more value from their existing technology investments.

To obtain copies of the following related DTT and Deloitte member firm thought leadership, please contact the authors of this report or visit our website: www.deloitte.ca

- Application Management: A formula for success
- It's 2008: Do you know where your talent is? Connecting people to what matters
- Taking HR to the next level: A structured approach to developing and executing an effective HR strategy
- Global Financial Services Offshoring report 2007: Optimizing offshore operations
- Global Shared Services Survey, 2007
- Why settle for less? Deloitte Consulting 2008 outsourcing report
- Look closer, look further: How to build a better business case for improving information capabilities

Contacts

For more information about Deloitte's Higher Education Practice or how we can help with your technology-enabled change initiatives, please contact:

Louise Upton

Partner, Deloitte
National Higher Education Leader
902-496-1827
lupton@deloitte.ca

Bruce Laco

National Technology Partner, Deloitte
905-948-6289
blaco@deloitte.ca

Wayne Boyle

National Technology Partner, Deloitte
902-496-1801
wboyle@deloitte.ca

Brian McKenna

Partner, Deloitte
416-874-4212
bmckenna@deloitte.ca

To find out more about Deloitte's consulting practice, visit our website www.deloitte.com/ca/consulting

www.deloitte.ca

Deloitte, one of Canada's leading professional services firms, provides audit, tax, consulting, and financial advisory services through more than 7,700 people in 58 offices. Deloitte operates in Québec as Samson Bélair/Deloitte & Touche s.e.n.c.r.l. Deloitte & Touche LLP, an Ontario Limited Liability Partnership, is the Canadian member firm of Deloitte Touche Tohmatsu.

Deloitte refers to one or more of Deloitte Touche Tohmatsu, a Swiss Verein, and its network of member firms, each of which is a legally separate and independent entity. Please see www.deloitte.com/about for a detailed description of the legal structure of Deloitte Touche Tohmatsu and its member firms.

© Deloitte & Touche LLP and affiliated entities.
Designed and produced by National Design Studio, Canada 07-1159