

**Office of the Chief Information Officer
Bowling Green State University**

A Report of the External Review Team

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June 7, 2005

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Section I: Introduction

This document summarizes the external review of the Office of the Chief Information Officer at Bowling Green State University (BGSU). This external review was performed as part of the University's program review of support units. The review was conducted on April 14, 2005 by a two person external peer review team with a combined 50 plus years of IT experience. The team included:

Ilee Rhimes
Chief Information Officer
Ohio State University

Mike Droney
Vice-President for Information Services
Cleveland State University

Input from this document will be combined with materials from BGSU's internal review to make up a final report. Linda S. Dobb, Executive Vice President & Secretary to the Board was the gracious host for this external review. The Office of the Chief Information Officer and Bruce Petryshak, the Chief Information Officer, report directly to Linda Dobb.

The interview team thanks everyone involved in the review for taking time out of their busy schedules to provide feedback in an open, cooperative, and professional manner. This positive attitude made the review pleasant and productive. This external review report is summarized as strengths, opportunities for improvement and closing comments. The process and approach is outlined in section II of this report.

Section II: Process and Approach

The external review was scheduled several weeks ahead of the actual external review date. In preparation for the review, the review team received the internal program review or self study report for the Chief Information Officer in March, 2005. Included in the self study report was:

- An overview of the Office of the CIO
- Office of the CIO organization charts
- Financials
- Colleges and Department partnerships

- The program review for Information Technology Services (ITS)
 - Introduction
 - History of ITS
 - Staff training
 - Technology and services
 - Planning
 - Security and compliance
 - Information Technology Committee (ITC) purpose, functions, membership and policies
- Program review for the Student Technology Center
 - Introduction
 - Organization
 - History
 - User needs
 - Mission
 - Financial resources
 - Future needs
- Program review for the Instructional Media Services (IMS)
 - Introduction
 - Organization
 - History of IMS
 - Assessment of user needs and changes in service
 - Mission of IMS
 - Future planning and resource needs
 - Upgrade technological equipment
 - Budget
 - Initiatives and activities
- Program review for the Web Applications area
 - Introduction
 - History
 - Organization
 - Initiatives and activities
- BG@100 Project
- BGSU Connect newsletter
- The Office of the CIO 2004 – 2005 Annual Imperatives
- Office of the CIO Annual Report 2003 – 2004
- Strategic Plan for Information Technology, November 15, 2002 prepared by the ITC

The external review team was encouraged to visit the BGSU web site www.bgsu.edu/offices/cio for additional information. Furthermore, during the first week of April the review team was provided two five-inch binders of detail information pertaining to the CIO area. Included was:

- CIO newsletters
- Self Help documents
- Service Level Agreements

- BGSU Strategic Direction
- Annual Report 2002 - 2003
- CIO Annual Imperatives
- EVP Strategic Issues
- BGSU Academic Plan
- Account forms
- Disaster Recovery Plan
- Construction projects
- Policies and Procedures
- Digital Asset Management RFP
- BG@100 Project documentation

The above materials and web information provided the review team with the background needed to formulate interview questions and requests for tours of specific IT areas on campus. During the visit, the reviewers had the opportunity to meet and interview many members of the university community including the Executive Vice President and her Cabinet, the CIO and his Cabinet, the Deans, the Information Technology Committee, the VP for Finance and his senior staff, senior Student Affairs staff, Student Technology Center staff, Instructional Media Services staff, the BG@100 Project team and a select group of BGSU power users. The itinerary for the Program Review team can be found in Appendix A.

The majority of the interviews were conducted in group meetings of 8 to 15 BGSU professionals with both reviewers present for approximately one hour each. Questions were asked in a manner to address specific interview questions but also provide an open forum for discussion of strengths and opportunities for improvement.

Section III: Strengths

The pre-review materials revealed an IT organization that is organized and performing at an above average level. Of significant interest was the IT Strategic Plan, the Disaster Recovery Plan and the support and services extended to BGSU faculty, students and staff.

The interviews resulted in some overriding themes of strength within the Office of the Chief Information Officer. They are summarized as follows:

1. Users interviewed reported that services received from the Office of the CIO have improved significantly in terms of quality and timeliness during the tenure of the current CIO. Users reported significant improvements in communications and quality of service received in support of day-to-day operations including the help center/desk and student computing center. For example, the assignment of dedicated support staff in key buildings has significantly decreased the time required to respond to and resolve issues for academic customers.

2. The CIO leadership staff was recognized for being more customer/service oriented and fostering greater respect among internal and external customers.
3. The Desktop Refresh and Software Program were identified as a major success because it has enabled the university to systematically refresh PC technology. In particular, members of the academic community expressed appreciation for this program as being strategic and essential to insuring the technology users had access to keeping more contemporary technology tools.
4. The CIO office was complimented for improving overall IT relationships & collaborations. The CIO was described by one senior university staff member as being a “silo breaker” for his ability to get others to work across organizational boundaries. The CIO was recognized for developing and maintaining direct one-on-one relationships with the Deans and BGSU executive leadership, fostering a “team” environment, and sharing an IT vision that challenged and energized the BGSU community. The credibility gained from the leadership style of the CIO and his staff has enabled them to effectively broker collaborations and foster synergy among departments on technology related projects and systems..
5. While there is still much work to be done, the BG@100 Project is well organized, and project team members are confident that they are on target to meet their June 2005 project completion date. We were impressed by the project governance and organization structure that included dedicated full-time staff from the HR organization. Project team members had a clear understanding of the remaining issues, risks, and mitigation options. Their attention to data conversion quality and end user training was also impressive. In addition, the off-campus facility, secured to house the project team, was cited as a major contributor to team cohesiveness, productivity, communications and high morale.
6. The student computing center was an impressive operation. It was packed with students working on technology projects, conducting training and receiving training. The overall attention to student computing needs appear to be excellent.
7. The on-going budget to increase and maintain the number of technology enabled classrooms was identified as a strength for the IT organization.
8. Several other areas were noted as strengths during our interview. They included:
 - a. Central security
 - b. Student Tech Center
 - c. Server management
 - d. Active role with regulatory compliance
 - e. Registration on the web
 - f. eMail improvements
 - g. Card reader project
 - h. Lab monitoring

- i. SPAM filtering
- j. Blackboard support
- k. Moving IMS reporting to the Office of the CIO
- l. Affirmative Action video for the community

Section IV: Opportunities for Improvement

One item missing from the pre-review materials was an IT scorecard of performance metrics. An identified group of performance metrics, that are refined periodically to reflect feedback, are needed to systematically measure user satisfaction with services and support. Performance metrics enable CIO organizations to measure the effectiveness of their operating and management strategy, and make refinements as needed. Examples of performance scorecard metrics include such items as web activity, data center service levels, network uptimes and development project statistics. However, it is important to review the plan on a periodic basis to incorporate new technologies and institutional change.

Furthermore, the interview resulted in the identification of the following opportunities for improvement.

1. Many interviewed groups expressed dissatisfaction of the BGSU web site. Following are some representative comments received from interviewees: *“hard to navigate from the outside, needs more of a customer look, no real time updates, not user friendly, the slow adoption of the content management system, and development very slow echoed in many of the group interviews”*. It appears that there is a need for better identification of responsibilities around the management of the university web site and content. Also, a more systematic way of receiving feedback from university stakeholders would help identify opportunities for improvements. In addition, a comparative analysis of web resources allocated by other institutions of the size and complexity of BGSU may reveal that the number of staff allocated to this area is less than the average.
2. The Information Technology Committee’s charter, membership policies and overall goals and objectives with members should be reviewed. Information Technology Committee members expressed some uncertainty about their purpose and objectives. The external review team believes that this uncertainty is due, in part, to the increasing effectiveness of the CIO, and the improving IT experience on campus. Often committees are established to address specific issues and once resolved have to revisit their overall purpose and meaning.
3. The Deans indicated that it would be helpful to have the CIO serve with them on the expanded President’s Cabinet.

4. With the size and complexity of BGSU technology environment, strong consideration should be given to creating an internal EDP audit function.
5. There was some academic community support for centralizing more college IT functions under the Office of the CIO.
6. There are concerns about the student residential hall telecommunications network in the areas of bandwidth, server security and general wiring.
7. The project staffing for the BG@100 Human Resources system has increased competition with other university areas for scarce IT resources. Responding to this issue will require additional emphasis on change management and prioritization of IT resources.
8. While the BG@100 Human Resources system is nearing successful completion, the implementation of the remaining ERP systems for finance, student, and data warehousing must move forward in order to create the integrated information systems environment that is mission critical for the university. The size and complexity of these system implementations will present a major challenge. The continuation of the methodical approach to project management as well the participation of key user staff on the project teams will be a critical success factor.
9. Even though users expressed satisfaction with IT services and support, the CIO office would benefit from establishing a system to survey the BGSU user community (faculty, staff and students) on a regular basis to gather feedback on their satisfaction with IT services and support, and use the results to make ongoing improvements.
10. The technology strategic plan that BGSU currently has in place is the key to maintaining strategic alignment with institutional goals. The overarching purpose of any technology plan is to create a shared vision for the use of technology in the academy. The goals are to better align technology and academic plan initiatives, provide a conduit for ongoing communications between technology providers and users, and establish a context for ongoing communications for setting future technology goals. The existing BGSU technology strategic plan was developed several years ago. Therefore, we recommend that BGSU establish an ongoing process (annual or biannual) for reviewing and updating the plan to reflect changes in institutional requirements and technology needs.

Section V: Closing Comments

Our closing comments are focused on the importance of strategically aligning technology governance and goals with the governance, mission and strategic goals of the university. The CIO appears to be well connected to the strategic goals and governance of Bowling Green State University. Bruce Petryshak and his senior staff seem to be well aware of the many factors that influence higher education, its business processes, and its impact on the innovative use of technology. Bruce clearly understands the institutional governance process and the importance of ongoing communications with all levels of university leadership. For example, he communicates on a systematic and one-on-one basis with the collegiate deans, members of the executive team, and faculty governance leadership.

In our exit interview with Bruce, we found that nothing we brought up in this report was a surprise to him. In addition, we were impressed by the commitment and knowledge of the users of technology at all levels – i.e., all the people we interviewed. They understood that the tools of technology are major change enablers, but on their own, will not provide the breakthrough solutions that are needed. They understood that the innovative use of technology tools is the key. For example, existing workflow processes and document handling procedures need to be continuously improved and re-engineered (where necessary) to make more effective use of new technologies. A key challenge for the CIO will be to deal with economic reality while continuing make progress on technology solutions that support and advance the goals and aspirations of Bowling Green State University.

We hope our observations will help the Office of the CIO and members of the university community make the case for the needed for improvements in the areas we have noted. Continued emphasis on collegiate relationships, technology governance and advisory groups will foster the environment that is necessary to develop the necessary buy in and consensus needed to implement the technology solutions required to respond to current and future needs.

12:00 – 1:00 pm Lunch with Dean’s Council @ Bowen-Thompson Student Union 307

<i>John Folkins</i>	<i>Jim Smith</i>
<i>Bill Balzer</i>	<i>Heinz Bulmahn</i>
<i>Josue’ Cruz</i>	<i>Robert Edmister</i>
<i>Lorraine Haricombe</i>	<i>Dick Kennell</i>
<i>Don Nieman</i>	<i>Linda Petrosino</i>
<i>Ernie Savage</i>	

1:00 – 2:00 pm CIO Cabinet @ Hayes Hall 203

<i>Bill Gerwin</i>	<i>Toby Singer</i>
<i>Kevin Work</i>	<i>Deb Wells</i>
<i>Dale Schroeder</i>	<i>Cindy Fuller</i>

2:00 – 3:00 pm Student Tech @ Saddle mire second floor

<i>Kim Fleshman</i>	<i>Candy Bucher</i>
<i>Jerry Hartwell</i>	

3:00 – 4:00 pm IMS @ 103 Olscamp

<i>Kevin Work</i>	<i>Julie Baker</i>
<i>Jodi Barnes</i>	<i>Lee Floro-Thompson</i>
<i>Bailey Garvin</i>	<i>David Hampshire</i>
<i>Jerry Hartwell</i>	<i>Marlene Helm</i>
<i>Stephen Kendall</i>	<i>Geneva Long</i>
<i>Dave Steen</i>	<i>Debra Weirauch</i>

4:00 – 5:00 pm BG@100 @ Wooster Street location

<i>Scott Bailey</i>	<i>Demetria Graham</i>
<i>Raj Nagendram</i>	<i>Donna Wittwer</i>
<i>Kriss Ferluga</i>	<i>Tammy Ludwig</i>
<i>Yajing Hu</i>	<i>Larry Smith</i>
<i>John Brothers</i>	<i>Kevin Washington</i>
<i>Kristen Williams</i>	<i>Todd Glick</i>
<i>Ben Santelman</i>	<i>Chavi Mohan</i>
<i>Bill Gerwin</i>	<i>Jen Sader</i>
<i>Mark Heider</i>	<i>Mike Failor</i>
<i>Sue Tomor</i>	<i>Karen Woods</i>
<i>Phyllis Short</i>	<i>John Konecny</i>
<i>Robert Kupetz</i>	

5:00 pm Dinner on your own

Thursday, April 14, 2005

8:00 – 9:00 am Breakfast with EVP Cabinet @ Chart room

<i>Bill Balzer</i>	<i>Lorraine Haricombe</i>
<i>Patrick Fitzgerald</i>	<i>Roger Minier</i>
<i>Linda Gray</i>	<i>Marshall Rose</i>
<i>Rebecca Ferguson</i>	

9:00 – 10:00 am Power Users @ Chart room

*Roger Thibault
Inge Klopping
Mitch Miller
Sub Ramakrishnan
Laura Waggoner
Ron Lancaster*

*Kelly Broughton
Carol Hague
Dan Madigan
Nancy Colsman
Craig Cornell*

10:00 – 11:00 am

Wrap up @ Chart room

*Kevin Work
Bruce Petryshak*

Toby Singer

11:00 – 12:00

Lunch with Linda Dobb