1. Support Services Report Template

Report Info
- Name of the person completing this report: Mercedes Alvarez-Arancedo
- Title of the person completing this report: Director, Campus Information Services
- Supervisor/dean reviewing report: Borre Ulrichsen
- Service: Manage campus technology projects and recommend process improvements
- Division/College: Information Technology Services (ITS)
- Name of second reviewer (if necessary): Brad Wells

3. Mandated Service

Link to Scoring Rubric

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Provide a brief explanation, if necessary, in < 60 words.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

This service manages complex-interdepartmental projects. It supports the organization in selecting the optimal combination of projects to work on to best achieve CSUEB strategic and operational goals — while honoring constraints imposed by customers, organization capacity to absorb change, budget, timetables and other external factors.

Project Manager is responsible for planning, executing and closing projects. PM develops the project plan with the team and manages the team’s performance of project tasks. PM is responsibility of securing acceptance and approval of deliverables from the Project Sponsor and Stakeholders.

Business Systems Analysis is responsible for supporting initiatives across campus. BSA facilitates process and technology improvement activities and provides operational support and functional expertise for processes and applications used on campus.

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

- Students: 20%
- Faculty: 20%
- Administrators/staff: 40%
- Colleges/departments: 20%
- Total: 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).
<table>
<thead>
<tr>
<th>Area</th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th>Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>This service supports applicant-serving operations by recommending business process improvement and implementing/updating software solutions.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>This service supports faculty, staff and student serving operations by recommending business process improvement and implementing/updating software solutions.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>This service supports alumni-serving operations by recommending business process improvement and implementing/updating software solutions.</td>
</tr>
</tbody>
</table>

Link to Scoring Rubric

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th>Area</th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
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</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your choice.

<table>
<thead>
<tr>
<th>Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>The consequence of not having this service is that complex interdepartmental projects aiming to streamline business process will not take place. An example would be Scholarship Management Solution aiming to streamline scholarship process. If this does not take place, then some CSUEB applicants may be discouraged to apply to our institution due to economic hardship which has a direct impact in the compositional diversity of our student population.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>President Morishita encouraged CSUEB to increase the six year graduation rate for entering freshman to 60% and the three year graduation rate for transfer students to 65% by 2020. Without this service, projects aiming to support student success may not take place, and the probability of increasing the graduation rate of our students will decrease dramatically.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework)</td>
<td>This service supports alumni-serving operations. Complex interdepartmental projects aiming to</td>
</tr>
</tbody>
</table>
Link to Scoring Rubric

2.4 Alignment with Shared Strategic Commitments
How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>Shared Strategic Commitments</th>
<th>If aligned or contributing, provide a description. (&lt;60 words for each SSC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</td>
<td>This service contributes on this commitment by providing functional subject matter expertise on different software used in different academic and non-academic departments that provide direct services to students.</td>
</tr>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td></td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student's educational experience and prospects for success as a graduate and life-long learner</td>
<td></td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td></td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>This services supports process improvements aiming to enhance sustainability such as the replacement of paper based systems.</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>This services supports continues efforts aiming to enhance CSUEB efficiency, transparency and accountability by streamlining and improving cross-functional business processes.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td></td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)</td>
<td></td>
</tr>
</tbody>
</table>

Link to Scoring Rubric

2.5 How might the demand for this service change over the next five years? (Please choose one category below).

Likely to increase

Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.

The demand for this service is anticipated to increase. Currently, CSUEB project portfolio is comprised by 170+ projects. An increasing number of departments intend to initiate new projects to continuously improve their processes and technology. For example, an increasing number of departments want to retire their legacy systems and implement new business processes and software/systems.

5. Quality of Service

Link to Scoring Rubric
3.1 Do you assess the quality of the service you provide?

Yes

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

The quality of this service is measured by industry standards. The team measures its performance against EDUCAUSE Core Data Survey, EDUCAUSE Campus Computing Survey, CSU-CO Project Management standards, Project Management Institution standards (PMI-PMBOK), and the International Institute of Business Analysis (IIBA-BABOK).

KPI used by this service includes (but not limited to) %customer satisfaction, %project fulfilling project success criteria, %project completed within budget, %project completed on time, %service completed within Service Level Agreement (SLA) agreed with customer.

Link to Scoring Rubric

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

PMO developed and implemented a CSUEB Portfolio Management Methodology which was successfully used to identify the University Cabinet top 8 projects from a list of 170+ projects (December 2012.)

PMO has developed and implemented CSUEB Project Management Methodology, which the team follows to manage their projects. All projects following this methodology have been successfully implemented.

BSA is in the process of formalizing CSUEB BSA Methodology. This methodology is based on market standard and campus needs.

PMO employees have been certificated using CSU PM certificate program. Project managers are in the process of obtaining market standard PMI certification. BSAs are participating in CSU CBAP (industry standard - IIBA-BABOK) certification program. PM and BSA are in a continual professional develop plan.

Link to Scoring Rubric

3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in <120 words.

The new ticketing system will enable an easier access to this service from the campus community. Additionally, the tool will provide more visibility to our stakeholders on the status of the service requested. And, as continue service improvement, PMO plans to implement Service Now - Portfolio and Project Management module.

The organization keeps a database of all the information and records of the previous executed projects. In addition, as part of project closure, the team reviews what worked and what did not work (and why) in each project. This central repository (Organizational Process Assets) is one of the multiple tools used for continuing improving the quality of this service.

Link to Scoring Rubric

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Additional resources could be invested in increasing the outreach of the service. Additional PM and BSA related training could be delivered to staff, faculty and students. Student assistants could be hired to support the organization while gaining experience in
real-word situation which prepare them for their future professional careers. Staff and faculty could partner in case-study projects which could result in CSUEB publications. Staff and graduate students could partner in executing innovative projects.

More project could run in parallel and a greater number of operations could be streamlined.

It is important to understand that for very complex project there is a fine balance between the need for improving efficiency in campus and the campus capacity to absorb this positive change.

**Link to Scoring Rubric**

**3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?**

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

ITS Leadership meets with Vice Presidents, Deans, as well as representatives from faculty, staff and students on a regular basis to collect informal feedback on customer satisfaction.

Additionally, informational interviews are conducted among key stakeholder of current projects. And, as part of project closure project stakeholders' customer satisfaction is gauged.

**Link to Scoring Rubric**

**3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.**

N/A

**Link to Scoring Rubric**

**3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?**

Yes

If yes, please describe in <120 words. If no, please explain

The division follows university policies and guidelines from Human Resources, Finance, and others in managing day-to-day operations.


**Link to Scoring Rubric**

**3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?**

Yes

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

The annual quality goal for this service is 100% customer satisfaction in regards to project deliverables (defined as the PROJECT SUCCESS CRITERIA).
All complex projects initiated since Oct 2011 have been successful. Examples of these are: onboarding project (aiming to provide new employees access to all required systems on their first day of hire), class climate project (aiming to streamline business process for class evaluations with the objective of having timely evaluation for all courses on campus, with secured data storage capabilities and 6 years of history available).

**Link to Scoring Rubric**

**3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?**

No

If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in < 120 words. If no, please explain.

**6. Efficiency of Service (cost effectiveness)**

**Link to Scoring Rubric**

**4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.**

272759

Attach your allocated spreadsheet here.

ITS_ExpenseAllocation_4-1 and 4-2.xlsx

**Link to Scoring Rubric**

**4.2 Using the spreadsheet provided, please distribute your department's annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.**

107753

**Link to Scoring Rubric**

**4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.**

2475.5

Attach your allocated spreadsheet here.

ITS_SpaceAllocation_10112013 - 4-3.xlsx

**Link to Scoring Rubric**

**4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?**

Yes

If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.
Manage campus technology projects and recommend process improvements is a new service for ITS division.

The creation of Project Portfolio and Project Management methodology, as well as the process of formalizing BSA methodology, include reviewing and streamlining all internal process. This results in an improvement in regards to efficiency and cost reduction.

4.5 What idea(s) do you have for improving the **efficiency** (cost effectiveness) of this service **within existing resources** (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

Continue with BSA methodology formalization process. Continue with business process improvement and continue training the team with market standards, innovative ways of solving existing issues, and continue enhancing communication processes.

Implementing Portfolio and Project Management modules in IT service management tool (at not extra cost).

4.6 What idea(s) do you have for improving the **efficiency** (cost effectiveness) of the service **if additional resources were provided**. Please describe your idea(s) in <120 words.

Additional resource would allow us to outreach to a greater number of stakeholders and work on multiple projects in parallel. It will also allow us to incorporate additional tools to our toolbox to enhance communication and responsiveness.

4.7 Do you have any plan(s) to improve the **efficiency** (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

Yes

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

Plan to continue increasing our productivity by continue enhancing the team's skills through professional development programs.

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

The estimated output for this service for fiscal year 2011-12 is 10 projects/assessments. The following lists some of the projects and assessments delivered by this service:
1. Creation of CSUEB Project Portfolio Management Methodology. This methodology was used to identify University President's Cabinet top 8 projects from a list of 170+ project requests.
2. Creation of CSUEB Project Management Methodology
3. On-boarding process enhancement project
4. CSUEB Scheduling/Calendar system assessment
5. CSUEB Digital Signage assessment
6. CSUEB Emergency Notification assessment
7. Pioneer Laundry upgrade
8. Pharos printing solutions for students upgrade
9. Secure on online credit card transactions for donors
10. Baycard service for students enhancement project
7. Other

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

This service focuses on very complex and cross functional projects and it serves the entire campus community.

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

PM focuses on the process (on how to run a project) while BSA focuses on the content (business aspect). Project managers use a sound and proven CSUEB methodology to run projects, while BSA provides a wealth of business critical thinking as resource of the project. PM and BSA combined are agents of positive change for the organization who implement process and technology improvements on campus.

A distinctive aspect of BSA is that it serves as the middle tier between the technical team and end users to understand the operational needs and deliver on those needs.

PMs and BSAs serve all divisions and provide support on variety of projects across different divisions.

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

Project Portfolio Management (PPM) is related to strategic decision making process and risk management. The goal of PPM is to align the organization resources with the organization needs from a strategic and operational point of view.

PPM uses decision quality and decision analysis best practice framework to ensure smarter, faster and more creative solutions. It focuses on decision making quality by framing a decision appropriately and generating creative alternatives.

Project management (PM) focuses on planning, execution, monitoring, controlling, prioritizing, managing project risks, managing conflict resolution, managing communication and expectations, managing issues and complexity.

Business System Analyst (BSA) focuses on critical thinking with the ability to adapt, invent and re-invent, collaborate, create and innovate. BSAs understand the structure, policies, operations, and needs of CSUEB and recommend solutions that enable the campus to achieve its organizational goals.

PPM, PM and BSA embrace the dynamic tension between creative disruption and operational efficiency and understand that our new connect area is changing how people engage, study and learn. This team responds to the complexity of increasingly interconnected organizations, societies, governments, market and students. This team is fully aware of the needs of the new and coming generations.