

Measures of Success 2004

Information Technology Services

Case Western Reserve University

December 2004

Table of Contents

Executive Summary	2
Methodology and Data Collection	3
Critical Findings and Opportunities Identified– 2003-2004	3
Students.....	3
Staff.....	3
Faculty.....	4
Benchmarking Academic IT Priorities	5
ITS Benchmarks 2003-2004	6
Total IT Funding	6
Total IT Operating Funding	7
Comparative Data with R1 Peer Universities	7
Staffing Comparisons with peer 35 R1	8
Strategic Goals and Objectives	9
Scorecard Metrics – Key Indicators	11
Strategic Technology Alliance	12

APPENDIX

To view the faculty survey and data, please refer to
<http://www.case.edu/its/publication/pdf/MOSFaculty2004.pdf>

To view the student survey and data, please refer to
<http://www.case.edu/its/publication/pdf/MOSSStudent2004.pdf>

To view the staff survey and data, please refer to
<http://www.case.edu/its/publication/pdf/MOSSStaff2004.pdf>

Executive Summary

Information Technology Services at Case (“ITS”) stewards and protects the University’s extensive technology resources. ITS also supports innovative technology applications, tools, and services to enrich Case’s learning, teaching, administrative and research environment.

ITS constituents represent a diverse group of users. Many are highly sophisticated users who expect complex technology solutions and support ranging from instructional technology to enterprise resource planning tools to research computing support. Usage patterns, expectations, goals and objectives of users also differ across and within user groups.

To gauge satisfaction and improve overall service to our customers – defined as Case faculty, staff and students – ITS is launching the first of its annual Measures of Success (“MOS”). Based on the California State University system model for reporting IT¹ services, resources, asset distribution and planning (to the California Board of Regents), Case plans to use the MOS as a platform to report its progress and performance record to the Case community in a systematic and annual basis. MOS will also capture the outlook of students, faculty and staff toward the services that ITS offers, as well as identify critical opportunities and gaps.

The 2004 MOS represents the first of an annual series of surveys and reports. In this first year’s gathering effort, ITS collected baseline data, both from a usage and attitudinal perspective, on the core services that it supports. The objective of this first effort was to create a snapshot of services and attitudes to anchor ITS growth and progress. Subsequent efforts will measure qualitatively and quantitatively the following objectives:

- Teaching and learning initiatives
- Student view of IT @ Case
- Faculty and staff perspectives
- Administrative initiatives
- Research support
- Strategic partnerships

¹ Now in its fifth year, Cal State’s MOS informs the California legislature of the progress and benefits of its Integrated Technology Strategy (ITS). Steve Daigle, the author of the survey, granted Case permission to model its efforts after his original work.

Methodology and Data Collection

For the MOS 2004 reporting effort, ITS collected data from faculty, staff and students via electronic survey. Also based on the Cal State MOS survey, the Case ITS surveys were customized by user group: one version for faculty, one for staff, and one for students. These surveys were disseminated via email. Users completed the surveys on line and the data was collected and analyzed by the survey tool, Survey Monkey. Major findings are reported below.

In addition to the survey, faculty also was invited by the Provost to attend a series of focus groups to comment on ITS initiatives, practices, and services. Numerous faculty members attended these focus groups which were organized into small groups and facilitated by an independent consultant.

Critical Findings and Opportunities Identified– 2003-2004

Students (n= ~600)

- All student respondents use campus IT technology and believe that it is essential to success in their academic environment and to their subsequent successes
- Most students use the technology in place today
- There exist opportunities to promote wireless and portal use to students
- Most students who used help desk services were largely satisfied with the services provided; however, there exists a clear opportunity to promote Help Desk services to many students who do not rely on it and rely instead on their peers for technical support

Staff (n= ~600)

- Majority believe IT is important to their professional productivity
- Majority believe that IT systems have improved and are satisfied with most services
- Opportunities exist to promote broader use of corporate calendaring and exposure to videoconferencing
- Majority of respondents were satisfied with central help desk services; however an opportunity exists to expand central help desk services as a majority of staff use departmental resources to resolve technical issues

Faculty (focus groups)

The response rate from the electronic survey sent out to faculty was too low to derive significant conclusions. However, several faculty members participated in focus groups. The main points derived from the focus groups can be summarized as follows:

- Inadequate communication from central ITS on new initiatives and their implementation (issue addressed with hiring of communications officer)
- Lack of understanding of the funding contributions made by the schools to central ITS and their direct relation to meaningful initiatives for faculty at Case (addressed with the suggestion of a different allocation model on ongoing efforts to disclose ITS spending both baseline, and à la cart)
- Faculty would like to see better help desk service, although those who commented on the quality of service ranked it highly (addressed with PerceptIS partnership)
- Faculty would also like to have a greater voice and more involvement on central IT decision making processes (greater interaction with governance bodies including FSCIR, ITSPAC, and CTOs)
- Majority of faculty focus group participants ranked the Software Center, increased means of virus protection, automatic upgrades and spam filtering tools as highly satisfactory (further enhanced with “x-image” available on all Dell systems purchased for campus use)

Benchmarking Academic IT Priorities

ITS participates in the Educause Core Data survey. This annual survey, now in its second year, provides data that helps Case ITS benchmark itself with its peer institutions. The data also provides important information about emerging technology trends, and competing priorities faced by academic institutions. The data has been especially critical in gauging where ITS stands relative to its peers in funding categories.

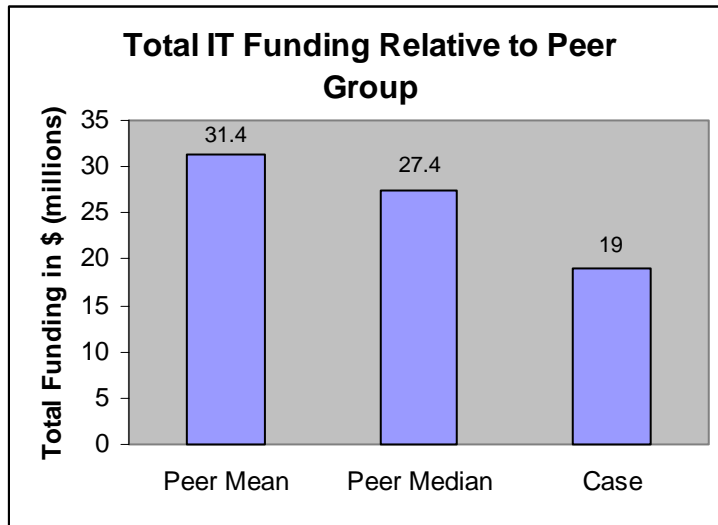
Listed below are the top concerns faced by academic IT professionals from around the nation. In the future, Case's MOS will build in many of these measures into its benchmarking and survey data collection:

1. Funding IT
2. Administrative/ERP/Information Systems
3. Security and Identity Management
4. Strategic Planning for IT
5. Faculty Development, Support, and Training for IT
6. Infrastructure Management for IT
7. E-learning/Distributed Teaching and Learning
8. Web Systems and Services (tied)
8. Enterprise-Level Portals (tied)
10. Business Continuity/Disaster Recovery (tied)
10. Governance, Organization, and Leadership for IT (tied)

IT Funding Comparisons

In reviewing the data below, please note that while Case is part of an elite group of R1 (research 1) universities, within the IT paradigm it more closely resembles schools which are not considered to be a part of the R1 institutions.

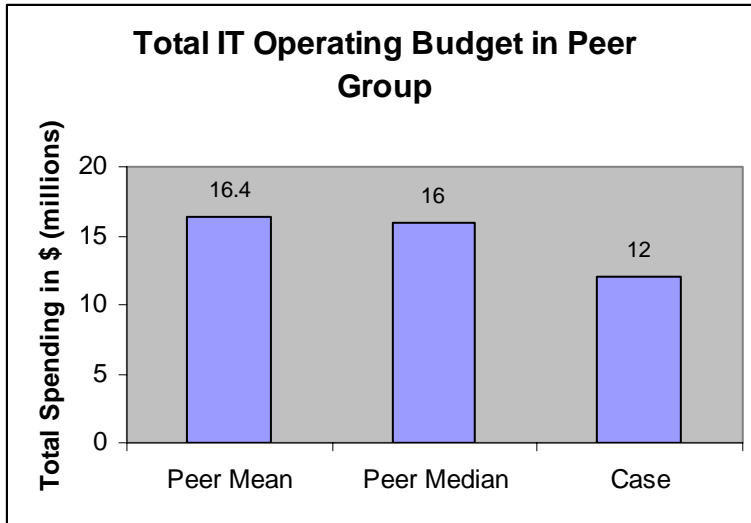
Total IT Funding



Peers in the Total Funding Category

- Michigan State University
- Fordham University
- George Mason University
- East Carolina University
- Indiana University-Purdue University Indianapolis
- University of Georgia
- Northern Illinois University
- University of Nebraska - Lincoln

Total IT Operating Funding



Peers in the Operating Budget Category

University of Technology, Sydney

Northwestern University

Rice University

Bentley College

Loyola University Chicago

University of North Texas

University of Calgary

University of Colorado at Boulder

Dartmouth College

The University of Arizona

Wayne State University

Comparative Data with R1 Peer Universities

	Case Rank (out of 35 R1s)
Total Funding	27
Operating Funding	24
Charge-backs	22
Capital Appropriations	32

Peers in Capital

Miami University
Georgia State University
Curtin University of Technology
York University
California State University, Fullerton
Michigan State University
Case Western Reserve University
Loyola University Chicago
University of Colorado at Boulder
University of South Carolina
California Polytechnic State University, San Luis Obispo
California State University, Los Angeles

Peers in Charge-backs

University of North Dakota
Texas Tech University Health Sciences Center
University of Waikato
Case Western Reserve University
University of Technology, Sydney
University of Southern Mississippi
Texas State University-San Marcos
The University of Tennessee Health Science Center
The University of Memphis
University of North Carolina at Greensboro

Staffing Comparisons with peer 35 R1s

	Mean	Median	Case
Total Central IT Staff	198.1	183	132
Total Decentralized IT Staff	135.4	93	89

Strategic Goals and Objectives

1. Completed: By summer 2003, identify a Customer Relations Management/Call Tracking system for use by the Help Desk and the entire service organization.
2. Completed: By January 2003 hire first Customer Consultants/Advocates and move immediately to create the next opening.
3. Completed: By June 2003 define baseline level of service.
4. Completed: By September 2003 restructure HELP desk into a Customer Service Center.
5. In Progress: By January 2004 complete service level agreements.
6. Completed In 2002-03 complete and distribute the Framework in both electronic form and in hardcopy across the campus. Members of the Strategic Planning Sub-Committee of ITSPAC will offer to provide briefings across the University regarding the planning framework.
7. Completed: In 2002-03 the Council of Technology Officers will recommend minimum baseline standards for the Schools through the Faculty Senate Committee on Information Resources & ITSPAC.
8. Ongoing: In 2003-2006 the Strategic Planning Sub-Committee of ITSPAC will provide ITSPAC with an annual report on progress to date in meeting the goals of the ITS Strategic Plan.
9. Ongoing: In 2003-04 the ITSPAC will encourage the eight Schools to develop and issue their own Information Technology Services strategic planning efforts.
10. Planned: In 2006 the process of developing new Strategic Planning priorities for 2007-2012 will begin.
11. Completed In 2002 the TCO model will be refined, and presented to the University's Budget Directors, to the Council of Technology Officers and through the ITSPAC for formal adoption.
12. Completed: In 2002-03 the TCO model will be distributed in both electronic form and in hardcopy across the campus and members of the Financial Planning and Modeling (FPM) Sub-Committee of ITSPAC will offer to provide briefings across the University regarding the planning framework.
13. In Process: In 2003-04 the ITS Program and Project Office will develop tracking tools for the TCO based on implementation work and coordinate those with the Office of the Vice President for Information Technology Services.
14. Ongoing: In 2003-04 the TCO model will be aligned with the University Budget process.
15. Ongoing: By 2004-05 the TCO model will be used in the Schools and Colleges as well as Departments for major expenditures exceeding \$250,000.
16. Completed: In August 2003 the implementation of the new network infrastructure will be completed.

17. In progress: In Fall of 2002 the initial implementation of a network storage system will be completed.
18. In Progress: In 2002-03 a plan will be developed to make these storage services available to servers outside of Information Technology Services.
19. In Progress: In 2003-04 voice and video services will move to production on the new network.
20. Completed: In 2002-03 Instructional Technology and Academic Computing (ITAC) will hire its permanent Director.
21. Completed: In 2002-03 develop a multi-faceted communication strategy to meet the recommended strategies.
22. Completed: In 2002-03 ITAC, in collaboration with the Faculty Senate Committee on Information Resources, will develop a TCO and pedagogical model for the University's technology-enhanced classroom strategy.
23. In Process: In 2003-2006 the ITAC unit of ITS will develop a systematic plan for evaluating the use of and support for instructional technology at Case.
24. In Process: In 2002-2005 ITAC will engage other University Circle institutions in leveraging Case's investment in academic technology to meet the broader instructional technology needs of the Circle.
25. Completed: In 2002-03 the ERP environment planning will be completed.
26. Completed: In 2002-03 a detailed implementation strategy will be developed.
27. Completed: In 2003-04 the first core modules will be installed and made operational.
28. Completed: Training for the ERP project will begin in 2002-03.
29. Completed: In 2004-05 all core ERP environment will be installed and operational in production for all constituents.
30. Completed: In 2002-03 the Case portal framework as well as prototype portal proof-of-concept will be complete.
31. Completed: In 2002 the portal program will be expanded to actively solicit input from across the University.
32. Completed: In 2002-2003 the first production version of MyCase will be completed (Release 2.0), including support for interface standards for local portlet integration.
33. Completed: In 2003-2004 the full-scale ERP/EAI final middleware architecture will be developed and implemented based on full net services protocols.
34. Completed: The MyCase portal is complete. By end of year 2004, MyCase will complete integration of wireless access, SIP-based internet messaging, ERP services and video.
35. In Process: By year end 2002, identify up to five focus areas for faculty research and development. Within each, prioritize possible projects and identify leaders of each. Goal is a portfolio of up to 15 possible projects for which to seek funding.
36. In Process: In 2002-03 create pilots including regional dark fiber initiatives, preliminary drawings for digital infrastructure facilities. A Week-in-the-Life of University Circle for New Media collaborations, public engagement on the

- development of a public space for technology, science and education, and an overall business case and communication strategy.
37. Tabled: In 2003 have under review for funding 20% of project portfolios for Centers of Excellence; in 2004 have 50% under review. By 2005 the initial round will be complete and a process will be in place to solicit and review opportunities on an ongoing bases.
 38. Tabled: By 2004 all UCI institutions will be able to join the University Circle GigaPoP facility. By 2004, the Advanced Technology Commons will have facilities to support operational needs of the statewide dark fiber project, the Greater Cleveland Digital Project, and other managed networking services.
 39. Tabled: By 2004/2005 ITS Operations are coordinated at the physical site of the University Circle Advanced Technology Commons (pending site development/building).

ITS will hold its next Strategic Planning Retreat in February 2005

Scorecard Metrics – Key Indicators

The following metrics are key indicators of operational excellence in the ITS division.

Instruction Technology and Academic Computing (ITAC)

- Use of Blackboard courseware
- Progress on building out Technology enhanced classrooms on campus
- Total faculty supported
- Adoption of MediaVision Courseware
- Number of videoconferencing calls

Enterprise Application Support (EAS)

- Transactions and their value
- Number of Solar connections
- Number of syllabus posted
- Number of online transcripts ordered

PerceptIS (formerly Customer Service and Support)

- Volume of calls (over time period)
- Open Backlog
- New calls
 - Calls Closed
 - Open Calls Remaining
- Abandon Rates

Positive (calls dropped with 30 seconds or less of hold time after any IVR message)

Negative (calls dropped with 31 or more seconds of hold time after any IVR message)

Acknowledgement Rate

Urgent – escalation acknowledged within 15 minutes

High – escalation acknowledged within 30 minutes

Medium – escalation acknowledged within 1 business day

Low – escalation acknowledged within 1 business day

Resolution Rate

Urgent – resolution within 4 hours

High – resolution within 1 business day

Medium – resolution within 3 business days

Low – Not Applicable

Technical Infrastructure Support (TIS)

Network Uptime

Server Uptime

Bandwidth

Summary of virus and spam

Wireless

Strategic Technology Alliance

The Strategic Technology Alliance (STA) is a partnership among non-profit and government organizations who share a common vision of the benefits to Cleveland and the region from full participation in the digital 21st century. The STA's goal is to deliver advanced information technology capabilities to the organizations and residents of Greater Cleveland in order to address community needs for education, job training, health care, cultural enrichment, research, economic development and empowerment, and civic participation.

STA members include:

- American Civil Liberties Union of Ohio
- Baldwin Wallace College
- Case Western Reserve University
- Cleveland Clinic Foundation
- Cleveland Institute of Art
- Cleveland Institute of Music
- Cleveland Museum of Art
- Cleveland Museum of Natural History
- Cleveland Scholarship Programs
- Cleveland State University
- Cuyahoga County Public Library
- HealthSpace Cleveland
- 90.3 ideastream
- John Carroll University
- Lorain County Community College
- MetroHealth System
- Nature Center at Shaker Lakes
- OneCleveland
- City of Shaker Heights
- Thea Bowman Center
- University Circle Incorporated
- University Hospitals Health System
- Ursuline College
- Western Reserve Historical Society

The University forms Strategic Technology Partnerships with vendors who:

1. Have technological goals in line with the University's strategic technology directions.
2. Can provide products and services to the University, the Strategic Technology Alliance (STA), the students, faculty and staff of the University and the STA.
3. Are willing to participate with the University and the STA in collaborative technology initiatives.
4. Are willing to commit its organization to a minimum four (4) year commitment to the Strategic Technology Partnership.

STA Corporate partners include:

Allied Telesin
Sprint
Dell

Cisco
EMC
Motion Computing

Netgear
BARCO
Intellinet