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Project Management For Information Systems in Higher Education (PM FISHE)

Presentation to the HERUG International Conference

Newcastle, 10-12 April 2001

The problem: CAPSA

- "It was a severe disappointment that ORACLE were not more appreciative of the **massive size** of the project and the **enormous complexity** of University operations. KPMG should have been more alert to the **potential problems** of massive loading on the system." (Professor Longair Chair CAPSA Steering Cttee, Cambridge U, University Reporter, 18-10-00)
- "Even if the ORACLE system that the University has bought had been a good one, **the programme for its implementation** would have justified calling this Discussion, because it **contained every mistake that it was possible to make**… training programme... caused maximum disruption whilst still failing to give those who would have to use the new system the basic information…. no pilot scheme…. no back-up plan…. not adequately tested. All this was not only eminently predictable, but actually foreseen." (Professor J R Spencer, Professor of Law and Fellow at Selwyn College, Cambridge U, University Reporter, 18-10-00)

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What's it all about?

- HEFCE Good Management Practice
- Universities installing large scale, packaged information systems
- Little experience of such systems
- Learning on the job
- Collect and systematise the PM issues and good practice arising
- Create Project Management *Framework*

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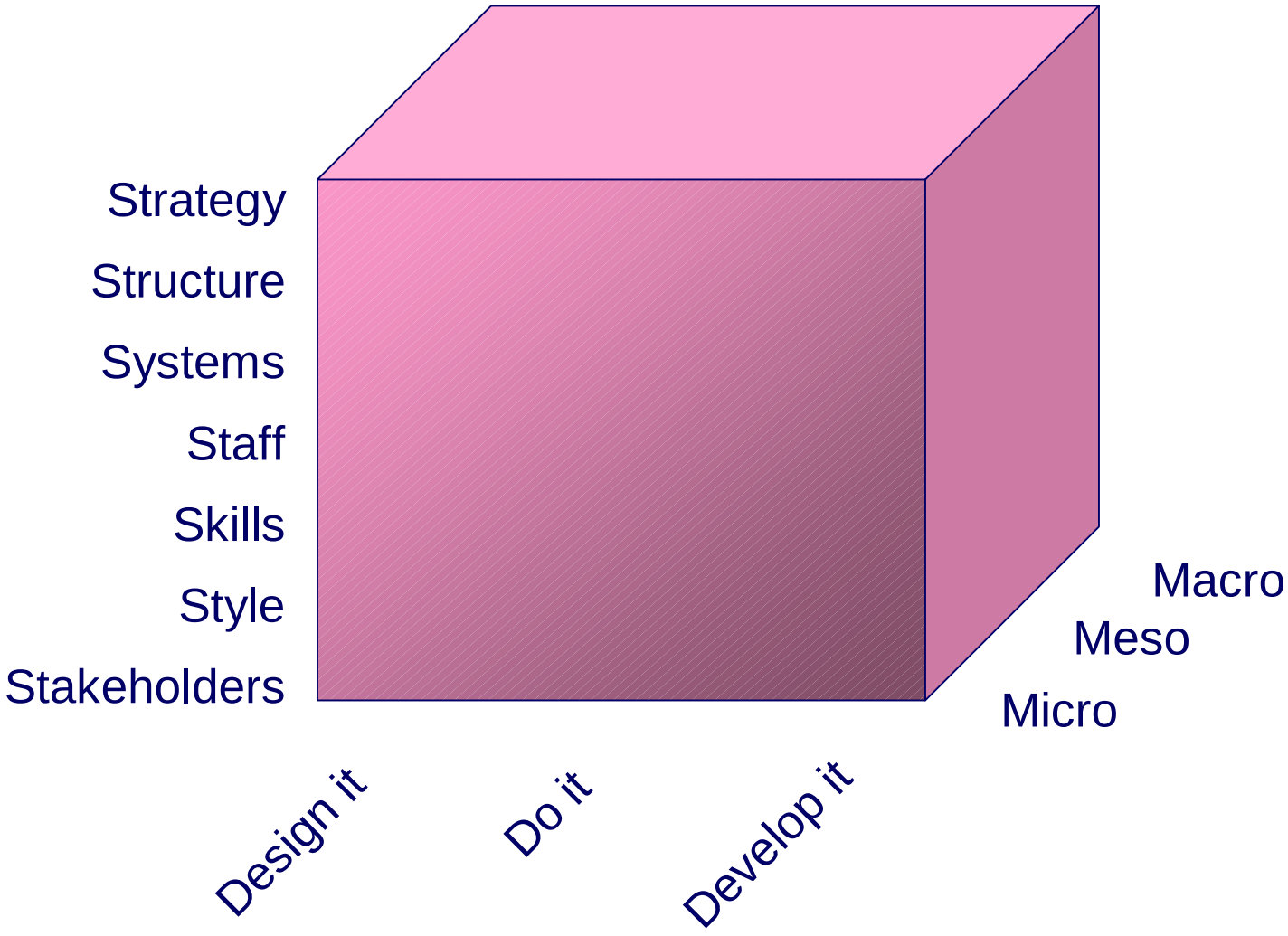
Scope



What we have done?

- Set up Project
- Literature Review (universities, PM, IS)
- Over 20 taped and (partially) transcribed interviews in:
  - Newcastle
  - Northumbria
  - Leeds
  - Leicester

What we have yet to do

- Realisation Phase
  - Create Web-based ‘toolkit’ of techniques for University IS Project Managers
  - Test it in Newcastle University
- Dissemination
  - Publicise the findings and toolkit
- Exit Strategy
  - Identify a vehicle to take work forward

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Some possible constraints

- Focus on SAP to exclusion of other vendors
- Focus on project team and sponsors not end users
- Looking at period mid 1990s-2000 (too retrospective?)
  - ERP type solutions - will it happen again?
  - Y2K driver - will it happen again?
  - Focus on admin (Finance/HR) but future is to do with systems dealing with academics and outside world (CM/CRM)?

Looking forward

- CM, CRM, MLE
- More engagement with the academic staff and departments
- More need for change management skills ...
- ...and less emphasis on technical issues?

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Critical Success Factors

	Strategic	Tactical
Organizational	• Sustained management support • Effective organizational change management • Adequate project team composition • Good project scope management • Comprehensive Business re-engineering • Adequate project champion role • Trust between partners • User involvement and participation	• Dedicated staff and consultants • Appropriate usage of consultants • Empower decision makers • Adequate training program • Strong communication inwards and outwards • Formalized project plan/schedule • Reduce trouble shooting
Technological	• Avoid customisation • Adequate ERP implementation strategy • Adequate ERP version	• Adequate software configuration • Legacy systems management

Source: Esteves, 2000

A flavour of the fieldwork

- “Project management is not an easy fit culturally in a university environment” (Programme Director)
- “You get good ideas from people like X… but in terms of the translation of that into something concrete that the University could actually use, I think that there is a massive gap there” (Technical Consultant)
- “The steering group was charged with getting he system up and running on time, not with aligning he project with university strategy. The mechanism for doing *that* is not well developed yet” (Finance Director)

...and more quotable quotes

- “The decision making process is slow and people on committees don’t understand the importance or implications of the decisions that they make” (Programme Administrator)
- “Vendors don’t really know what happens under the skin of a university and are too quick to make allegories to what happens in other sectors” (Programme Manager)
- “There is no body… which is the keeper of all these initiatives and is able to ask people for a business case for all the things that they want to do and then prioritise them” (Technical Director)

Project Management vs the University

	Project Management	Universities
Strategy	Clear Corporate and IS Strategy	Complex, not defined
Structure	Clear Line Responsibilities	Responsibilities overlapping, gaps, diffuse
Systems	Established formal systems of control	Diverse, often informal systems for control
Staff	Project Man' + Secondees	No tradition of PM
Skills	Use consultants to plug gap + Transfer Knowledge	No clear TK from consultants
Style	Task oriented	'Loosely coupled', Existential
Stakeholders	Small number of coherent groups, clear communication	Large number of diverse groups, difficult communication

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Tentative conclusions

- Not a project solution but a process solution?
- Adapting the university for PM and/or adapting PM for the university?
- Creating *university* (IS) Project Managers?
- Providing them with suitable tools?
- Developing wider awareness of PM in Universities?

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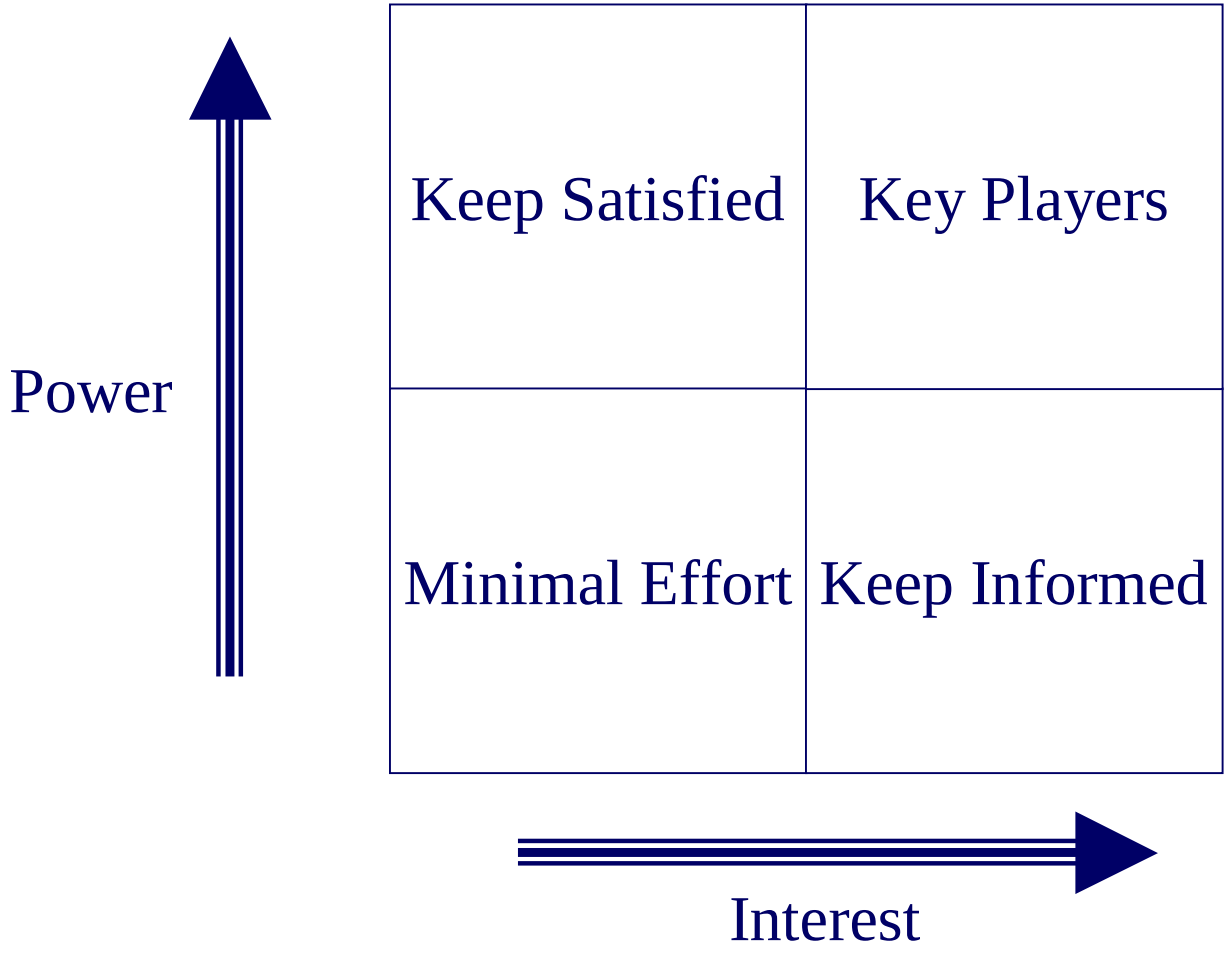
Realisation Phase

- Create generic toolkit of techniques to support development of university IS PM competence
- Built around the 7S framework
- Focus on the Change Management Elements of PM
- Web based interface
- Scope process/institution to maintain and develop toolkit

Example: Stakeholder Mapping

- Universities are complex with many potential stakeholders
- Large scale IS project have many stakeholders
- Project Managers need tools to
  - identify stakeholders
  - manage stakeholders
- Stakeholder mapping as an example

Stakeholder Power/Interest Matrix



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Identifying Stakeholders

- **Originator** (Person who suggested the project)
- **Owner** (Person who created the need for the project)
- **Sponsor** (Individual or group who authorises expenditure)
- **Champion** (Person who makes the project happen)
- **Users** (People who will operate the system)
- **Customers** (People who will pay for and/or receive benefits from the system)
- **Project Team** (Team members who deliver the system)
- **Senior Management** (Senior managers within the University)
- **Functional Managers** (Managers who will supply project team members)
- **Colleagues** (Peers elsewhere in the organisation)
- **Contractors/Consultants** (External individuals or groups providing specialist advice)
- **Suppliers/ Vendors**(External suppliers of equipment and resources)
- **Regulatory Authorities** (Health and Safety Executive etc.)
- **Government Agencies** (UCAS, HESA, etc.)
- **Trade unions** (AUT, MSF etc.)
- **Special Interest Groups** (CVCP, JISC, HERUG etc.)
- **Lobby Groups** (NUS etc.)
- **Media** (Local and national media, specialist/industry press etc.)
- **Other Individuals** (Students, parents, staff, Senate/Council members etc. if not covered above)

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Assessing Power and Influence

- Source of Power
  - Hierarchy (formal)
  - Control of Resources
  - Influence (informal)
  - Knowledge/Skills
  - Control Environment
- Indicators of Power
  - Status
  - Claim on resources
  - Representation
  - Symbols

- Assessing Influence
  - Use multiple sources
  - Don’t rely on public protestations
  - Critical test: will the stakeholder support (+) the project, oppose it (-) or ignore it (?)

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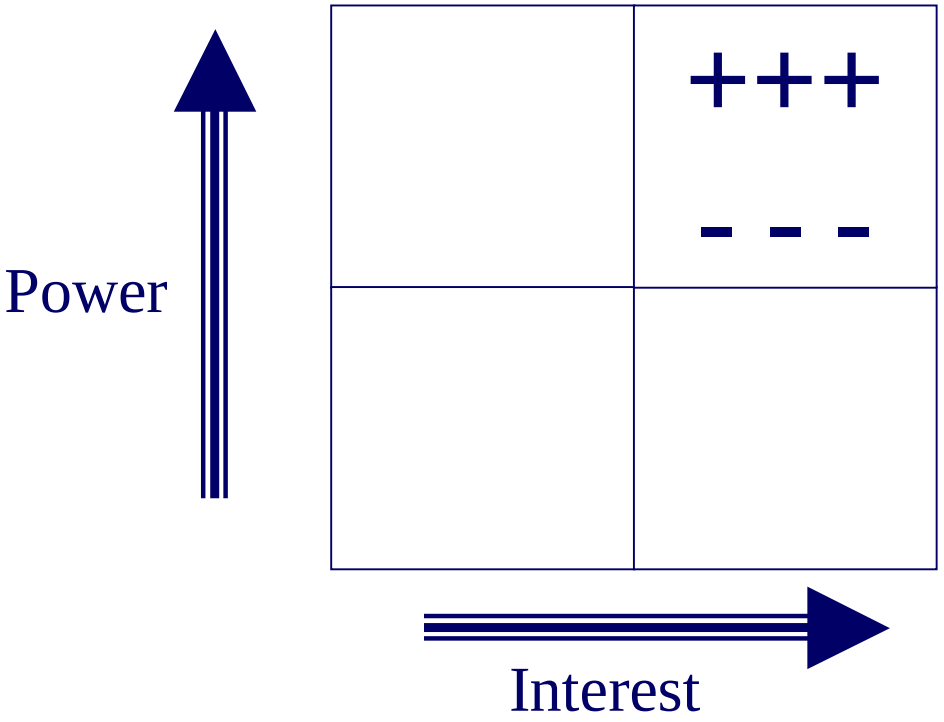
Managing stakeholder relationships

Style	Means/context	Benefits	Problems
Education and communication	Mutual trust/respect; small group briefings	Overcoming lack of information or misinformation	Time consuming
Participation	Small group/ taskforce involvement	Increases ownership of decision or process; may improve decision making	Time consuming
Intervention/ manipulation	Control retained but aspects of process delegated	Process is guided/ controlled but involvement takes place	Risk of perceived manipulation
Direction	Use of authority to set direction	Clarity and speed	Risk of lack of acceptance
Coercion/edict	Exploit power through edict or imposed change	May be successful in crisis or state of confusion	Least successful unless crisis

The Political Battleground



- Key Feature: Strong supporters and opponents of the project
- Key Danger: Limbo
- Key Strategy: Build resource base; overcome resistance; divide and rule

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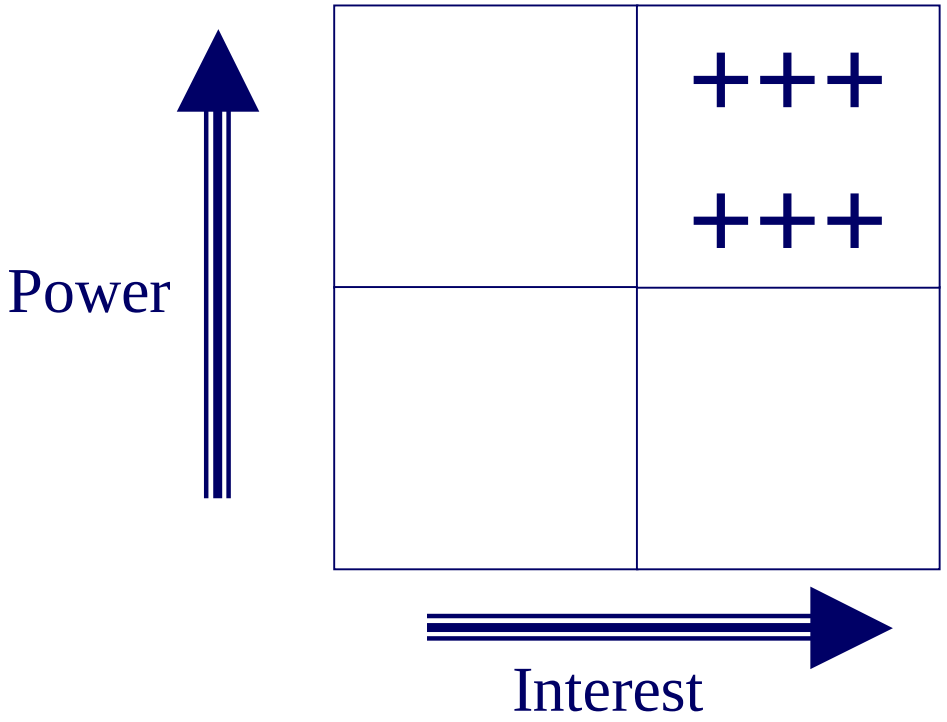
The Dream Ticket



- Key Feature: Several Champions, no opponents
- Key Danger: Complacency
- Key Priority: Keep stakeholders informed and satisfied
- Key Mechanism: Alliance building and maintenance

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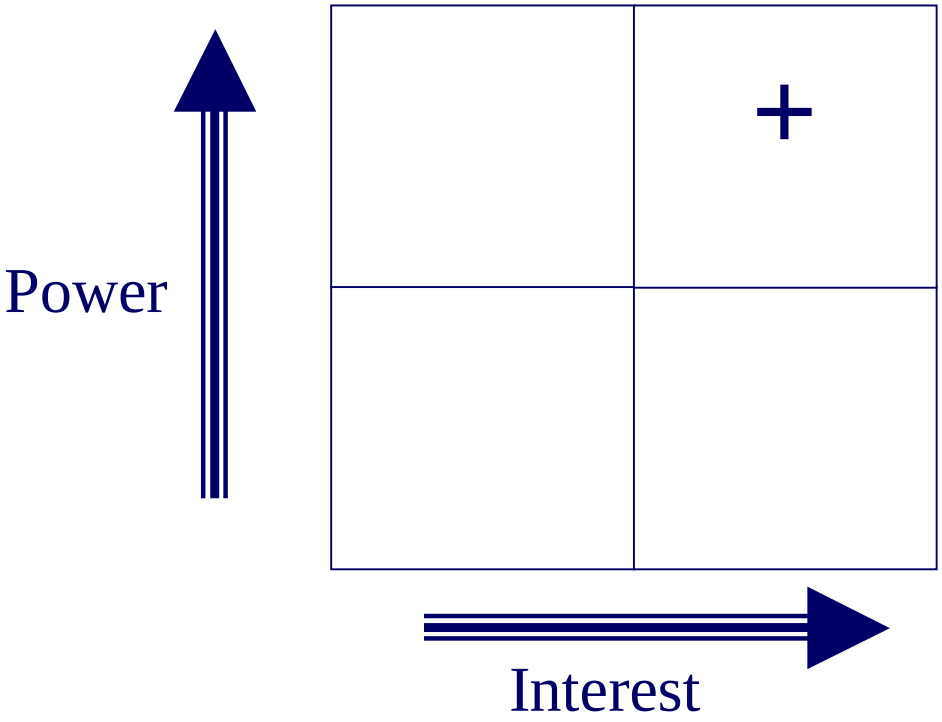
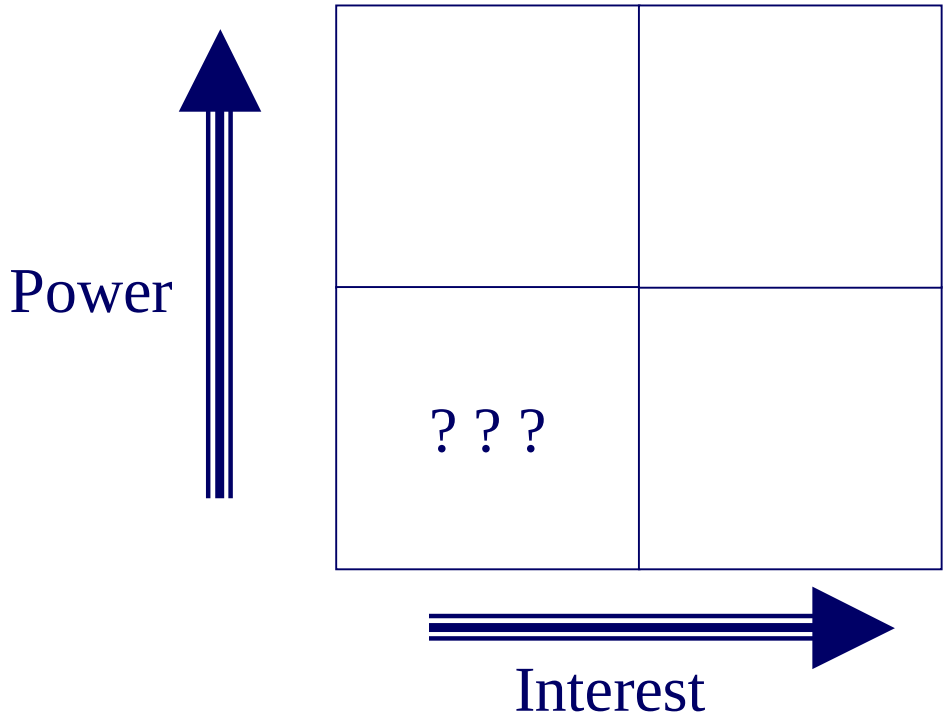
The Lone Champion



- Key Feature: One champion, no opponents
- Key Danger: Champion is lost
- Key Priority: Keep on board and broaden support base
- Key Mechanism: Maintain participation; foster interest and momentum from other stakeholders

The Autocrats Dream



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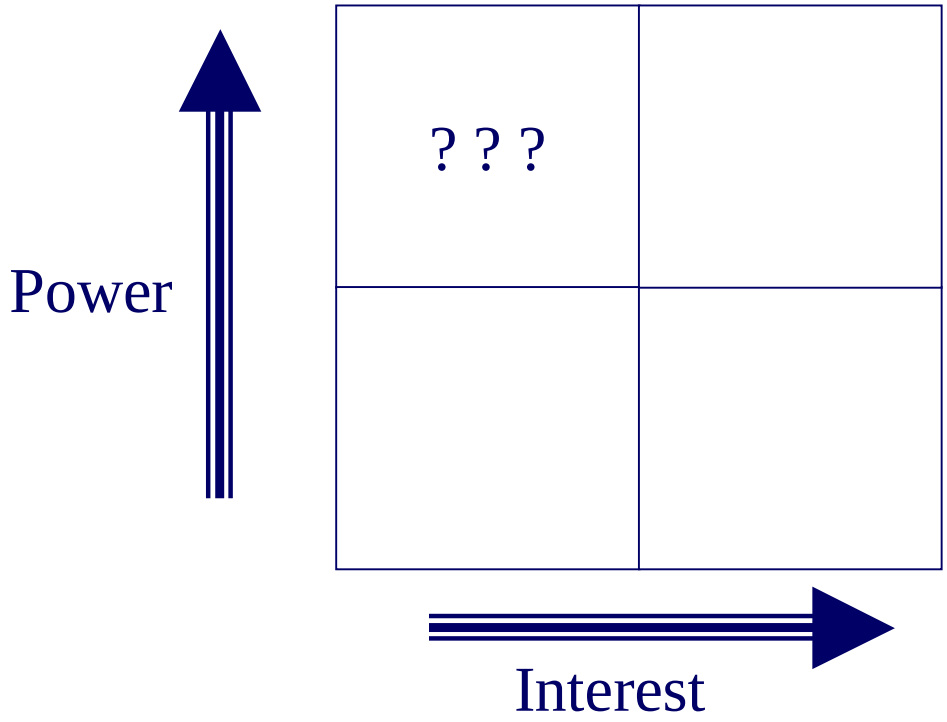
The Political Trap



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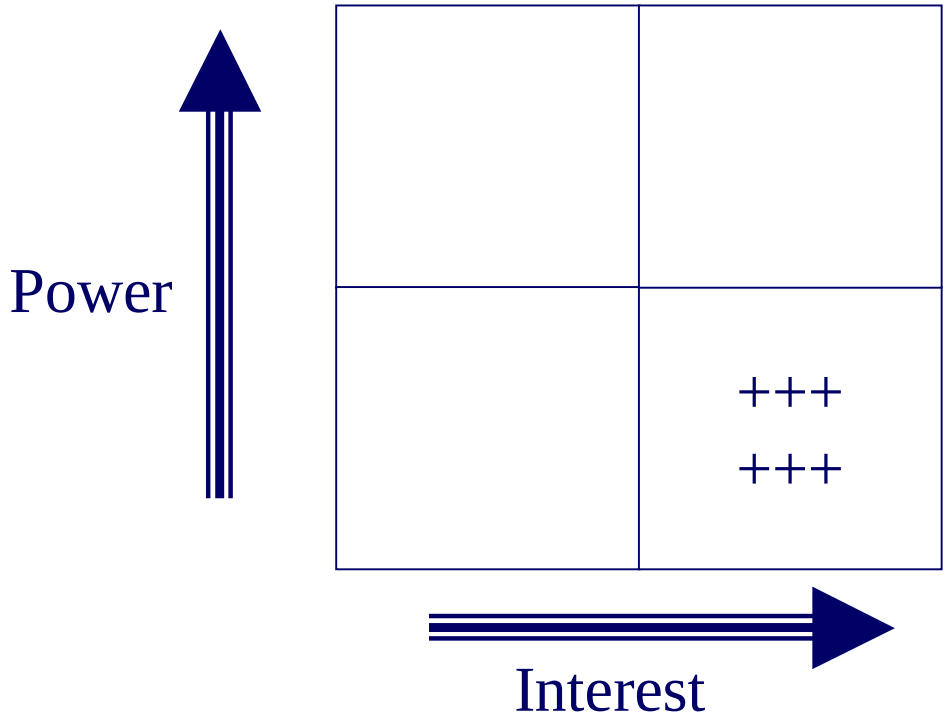
The Worthy Cause



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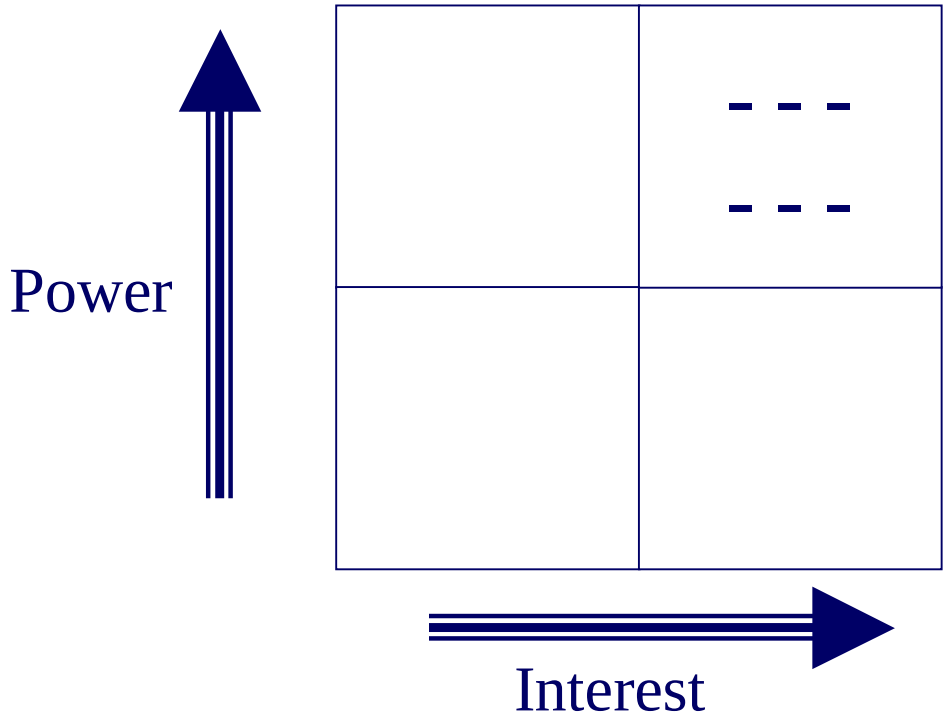
The Potential Lost Cause



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More Questions than Answers

- Do you recognise the picture painted?
- What are the implications of CM and CRM (not to mention MLEs) for your University?
- What kind of PM framework would help you to handle CM, CRM etc.?
- Are tools like Stakeholder Mapping *part* of the answer?
- What else is required for better PM?