Administration and Finance Full Program Review

██████████████

Submitted June 2016

██████████████ **Full Program Review**
June 2016

Executive Summary

Brief Overview

The ██████████████ Program Review was scheduled for completion before fall 2015. The review was purposefully delayed to allow ██████████████ to regroup after ██████████████.

A concerted effort was made to staff the committee with representatives from within the division of Administration and Finance, as well as stakeholders from outside of the division.

This program review focuses on four fundamental issues, in addition to the standard program review focal areas.

These items include:
A. Recruitment and retention of employees.
B. Strengthening of partnerships with key functional areas.
C. ██████████████████████ ██████████████████ to inform effective departmental direction and allocation of resources.
D. ██████████████████████████████
E. Standard Program Review focal areas.

The decision was made that data gathering would revolve around individual subcommittees, including those responsible for stakeholder surveys, focus groups, interviews, SWOT review, document reviews and visits from an external reviewer.

Recommendation (Item C):
The Program Review Committee did not provide detailed recommendations regarding item C (above). Therefore, it is recommended ████ form a task group to study the issue. It is recommended that the task group contact peer institutions to inquire how they obtain viable input from end-users. In addition, research should be conducted by the task group to ascertain best practices associated with obtaining viable input from ██████████████████████████████████████. (Note: The External Reviewer did provide a recommendation for item C – See page 17)

Recommendation (Item A):
Given recent compensation related discussions and decisions to create pay related sub-banding for ██████████████, it is recommended that an ██████████ be conducted that will allow effective use of the soon-to-be finalized sub-banding guidelines.

Position Description Document Review

Summary Findings:
The Positon Description Document Review subgroup noted a few inconsistencies in the use and description of the organizational values, particularly in the context of employee position descriptions.

Summary Recommendations (Item E):
Review the associated detailed findings and recommendations listed below and enact feasible modifications and adjustments.

Mission, Vision, Values Document Review

Summary Findings:
The Mission, Vision, Values Document Review team found ▮▮▮▮ has an opportunity to better align its mission, vision and values with ▮▮▮ guiding documents and with minor modifications, create greater clarity around the documents.

Summary Recommendations (Item E):
Review the associated detailed findings and recommendations listed below and enact feasible modifications and adjustments.

Website Review

Summary Finding:
The Website Review team found that the ▮ website displays accurate information; however, the layout is challenging to navigate.

Summary Recommendations (Item E):
It was noted that the ▮ website has maintained the same structure for quite some time in anticipation of an upgrade to the ▮ website, which is in process. Suggestions were made for ▮ to consider when upgrading the ▮ website.

▮ Executive Director Interview

Summary Findings:
▮ is making progress on many fronts, but requires additional resources to ensure it remains "cutting edge." Much work has been done to ensure alignment with all customer areas, handle the dramatic increase in projects, refine systems and prioritize projects, and structure the organization to efficiently and effectively provide excellent service.

Summary Recommendations (Item D):
Add ▮▮▮▮▮▮▮▮▮ to further support efficiency of projects and train them fully in workflow.

Customer Survey

Summary Findings:
▮▮▮▮ very well on this survey. Most respondents agreed that ▮▮▮▮▮▮ provide appropriate feedback on projects. Customers perceive ▮▮▮ may require additional staff resources and the ▮▮ process was a concern of some customers.

Summary Recommendations (Items B & D):
Add ▮▮▮▮▮▮▮▮ to further support efficiency of projects and train them fully in workflow. Review the ▮▮ process and consider revamping to address concerns of the respondents.

Employee Survey

Summary Findings:
Employees understand their duties, are familiar with ▮▮▮ mission, and understand their respective roles ▮▮▮▮▮ Respondents felt they possessed adequate knowledge to do their jobs and obtain adequate guidance and clear instructions ▮▮▮▮ leadership. Some voiced concern over lean resources, a need for more staff and compensation, partnership with stakeholders and stakeholder accountability as areas for potential improvement.

Summary Recommendations (Items A, B, & D):

Add ███████████████ to further support efficiency of projects and train them fully in workflow. ██ should continue to utilize the current method for assigning projects and assess its effectiveness on an ongoing basis over the next year.

Employee Focus Group

Summary Findings:
Focus group respondents indicated that two to three additional employees are needed in varied capacities. More strides in project management may be required, but should come in time. Communication is o.k., but continuous improvements are being made. █████████████████████████ ██████████. Some suggestions to improve assignment of projects were made. More collaboration with stakeholders was suggested.

Summary Recommendations (Item A & B):
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should continue to utilize the current method for assigning projects and assess its effectiveness on an ongoing basis over the next year. Provide opportunities to collaborate with stakeholders to better understand business processes and get BA's more involved at the very beginning of projects. Establish a university-wide pay scale █████ work, establish a staff fitness program, ensure developers receive accurate requirements and test cases and require employees to follow existing procedures.

External Review

Description:
The external reviewer for this project was ███████████ from the University of Virginia. She provided excellent, detailed recommendations. Below you will find only a brief synopsis. The recommendations provided by ██ ██████ should be reviewed carefully by ████████ and incorporated where appropriate.

Summary Findings:
The external reviewed heaped praise █████ for the way that stakeholders viewed the department. They were amazed by the amount of work accomplished by the team with limited resources. The ██ ████ should feel proud of this. ██ ██████ noted many findings that were based on 1) ████████ and customer feedback, 2) Staffing retention, skills and training, and 3) Planning, coordination and communication of priorities, as well as work assignments and governance and collaboration ██████ ██ and stakeholders.

Summary Recommendations (Items A, B & C):

1) ████████ and customer feedback:

- Add usability and testing to the feedback process and obtain feedback by observing users.

2) Staff retention and skills training:

- Evaluate the existing telecommuting and alternate work schedule policies and build some guidelines for ████████████
- Conduct a telecommuting or alternative work schedule on a trial basis for 6 months and if it does not work, revoke the privilege.
- Reduce ██ █████ Span by looking at establishing a project management office.
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- Provide more resources ███████ can work closely with departments, but can also be responsible for helping implement and evaluate new functionality and help with reporting and testing. Align these resources with the ████████████████.
- As the ██████████ continues to build a group of ████████████, communicate and share the value of those roles with the departments and stakeholders.
- Provide some level of project management training to █████████ and stakeholders.
- Develop a budget for providing rewards and recognition based on the JMU Rewards and Recognition Program.

3) Planning, coordination and communication with stakeholders:

- Continue to refine the ███████ issue process, possibly having a working group review them for opportunities in combining and streamlining.
- Share all of the initiatives and █████████ is undertaking and the resource implications with stakeholders and staff.
- For stakeholders and staff, clarify resource implications to support the delivery of new or changing services.
- Provide a web page and keep it current on strategic or high profile ███████, with clear communications on the impact of these projects on the stakeholders and timing on ███████.

Primary Report

Introductory Statement

This program review is part of a continuing effort in Administration and Finance (A&F) to periodically assess all units within the division. A&F units undergo a full program review every ten to twelve years and an alternate cycle program review between each full review. This series of program reviews was begun by the divisional Senior Vice President with the intent of improving the division's level of customer service and the overall efficiency of operations. The division's program review schedule and protocol have been prepared to be consistent with the general expectations of the university's regional accrediting body — the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC).

Overview

Description of Program Review

The ███████████████ Program Review was scheduled for completion before fall 2015. The review was purposefully delayed to allow ███████████████ to regroup after a serious data breach.

Phase 1 of this review began just prior to summer ███████ The following August, the program review's co-chairs (███████████████████) met with the department director and AVP to develop expectations, goals, objectives, issues, committee member recommendations and a work schedule.

A concerted effort was made to staff the committee with representatives from within the division of Administration and Finance, as well as stakeholders from outside of the division.

███████████████████████, requested that this program review focus on four fundamental issues in addition to the standard program review focal areas. These four items include:

- Recruitment and retention of employees.
- Strengthening of partnerships with key functional areas.
- Methods of obtaining feedback from ███████████████████ to inform effective departmental direction and allocation of resources.
- ████████████████████████████████████

Phase 2 began in September 2015 with a full committee meeting. The committee finalized and approved a work plan and designated subcommittees. The decision was made that data gathering would revolve around individual subcommittees including those responsible for stakeholder surveys, focus groups, interviews, SWOT review, document reviews and visits from an external reviewer.

Mission, Vision, Values of Unit

Mission

We are committed to ██
████████████████████████

Vision

We strive ██
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████████████

Departmental Values

* ▮▮▮▮▮▮▮▮▮▮▮▮ employees perform their job ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮
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* It is impossible to list every job requirement on an Employee Work Profile. Employees are expected ▮
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* Demonstrate the department's commitment to customer service ▮▮▮▮▮▮▮▮▮▮▮▮
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Key Elements of SWOT Analysis

Strengths
   Customer Service Success:
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Weaknesses

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Opportunities

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Threats

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Program Review Committee (Name, department, committee role)

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Research

Overview

Research Subcommittee #1 – Position Description Document Review

Description
The subcommittee to ███████ position descriptions met initially on ███████ Our approach to the review was to have each of the three subcommittee members review five of the 15 position descriptions. While reviewing core responsibilities/measures was within scope of the review, emphasis was placed on evaluating the position description ████████████ mission, vision and values.

The subcommittee met on ▮▮▮▮▮ to compare and discuss findings. We found the individual core responsibilities and measures clearly describe the breadth, depth and expectations of the positions. We found that ▮▮▮▮ mission, vision and values are incorporated into all position descriptions; however, there is some inconsistency.

Findings and Recommendations

Finding:
Innovation is noted as a value in all position descriptions; however, ▮▮▮▮▮▮ is not mentioned as a departmental value.

Finding:
Professional development is noted as a departmental value; however, professional development is not mentioned in all position descriptions.

There was some discussion whether the following is actually a value:
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It was suggested that ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮
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Recommendation:
Incorporate innovation into the departmental values.

Recommendation:
Incorporate professional development into position descriptions.

Recommendation:
If appropriate, incorporate the same values/measures across all ▮▮▮▮▮▮▮ From our review, we believe this was the intent, but with modifications to positions over time, it is understandable that they do not currently match.

Research Subcommittee #2 – Mission, Vision and Values (Guiding Documents) Review

Description

The Mission, Vision and Values Review Subcommittee set out to evaluate the mission in the context of the ▮▮▮▮▮▮▮▮▮▮▮▮ documents, the JMU guiding documents and best practices associated with the development of mission, vision and values.

Findings and Recommendations

Finding:
The MVV Subcommittee was unable to locate the mission, vision and values for the ▮▮▮▮▮▮▮ section of ▮▮▮▮▮▮▮▮▮▮ on their website:
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Recommendation:
Create link to mission, vision and values on ▮ landing page:
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Finding:

████████████████ current mission, vision and values statements do not closely align with ████████ mission, vision and values as stated in the █████████████ Strategic Plan ████

Recommendation:

████████████████ mission, vision and values should align with █████████████████ mission, vision and values as stated in the ████████████ Strategic Plan 2014-2020. ████ ██████████ mission, vision and values are:

█ **Mission:**

Deliver ███████████████████████ services that enable the university community to learn, innovate, collaborate and provide excellent service.

█ **Vision:**

Enhance learning, collaboration and service delivery through application of ███████████████ ████████████████

█ **Values:**

We value ██ ██████████████████████████

We value ██ ████████████████

Being trustworthy—██████████████████████████████████████ ████████

It is important that we focus on service, ████████████████████████████ ██████████████████

We value responsiveness, ███████████████████████████████ ████████

We will be forward-looking ███████████████████████████████ ██████████████

Finding:

██████████████████ current vision statement is task oriented and mostly grounded in the current day-to-day operations of the department.

Recommendation:

Create a vision statement that is aspirational, outlining what the department seeks to accomplish in the future. Note the JMU vision statement: "To be the national model for the engaged university…" Note the ██ vision statement: "Enhance learning, collaboration and service delivery through ████████████ ██████████████████████████

Finding:

There are currently nine departmental values. Each value statement contains two or more sentences. It is difficult to ascertain the true departmental values.

Recommendation:

See examples of value statements outlined in ███ Strategic Plan (████████████████ Strategic Plan ████████). Delete extraneous text and highlight key values in each statement. Consider reducing from nine to six or fewer departmental values.

Finding:

Current mission, vision and values are incorporated into all departmental employee work profiles.

Recommendation:
Ensure alignment of any new ███████████ mission, vision and values with the individual
Employee Work Profiles.

Research Subcommittee #3 – Website Review

Special Note: This review focuses on the ███████ website which includes █████ website. It is not the responsibility █████ to respond to this item since the site is not structured organizationally. There is a planned restructure of █████ website in the works. The information is included because the site could have an impact █████. Again, there is no need █████ to respond to these findings.

Description

The Website Review Subcommittee met on ██████████ and shared analysis of peer institution website comparisons. Our main focus was on "ease of use," the organization of content and ██████████ options.

Findings and Recommendations

Analysis included the following websites:

Old Dominion University	████████████████████
George Washington University	█████████
Emory University	██████████████████████████
University of Virginia	█████████████
University of Delaware	████████████████████
Rutgers University	█████████████
William & Mary	███████████████████████████
George Mason University	██████████████████████████
Towson University	█████████████████
Stanford University	██████████

Finding:
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Research Subcommittee #4 – ██ Director Interview

Description

The Director of ████████████████ was interviewed to ascertain 1) progress since the previous full program review dated ████; 2) policies and procedures; and 3) progress on goals and objectives.

Findings and Recommendations

Finding:

██

Finding:

██ is up-to-date on accomplishment of Goals and Objectives.

Finding:

Additional resources are required to ensure that ██ remains "cutting edge."

Finding:

██ is meeting the basic needs of the university, but would like to do more. Currently, work is being done to create priorities by collaborating with stakeholders. Work is being done to ensure that the appropriate resources are being allocated to get the job done.

Finding:

███████████████ are needed to support efficiency of projects and funding is required to train them fully in ████████████.

Finding:

There has been a greater emphasis on ████████████ to ensure more effectiveness and efficiency. There is a bit of resistance to this change, which is expected. Most employees are positive about this. Progress is being made.

Finding:

████, it was noted there was disconnect between ████████████. Lots of work on all sides has resulted in improved dialog and relationships among groups. ██ continues to ensure alignment between all areas.

Finding:

██ policies and standards are reviewed and updated on an on-going basis. There is currently emphasis on discussing and refining prioritization criteria.

Finding:

███ █
███ ██
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███████████████████

Research Subcommittee #5 – Customer Survey

Description

The Customer Survey team utilized the Qualtrics tool to survey key █ customers. The list of customers was based on the list of key customers/contacts provided by █ . The survey link was sent via email on ██████ and the survey was available for online completion from 2/2/16-2/22/16. A follow-up email to customers was sent ██████ Of the 61 surveyed, we received 30 responses. Survey categories gathered respondents' feedback in the following categories:

- Customer experience █████
- Satisfaction with individual ██████████████ █
- Overall satisfaction with ████████
- Satisfaction with the ███ process
- █ communication regarding ████████

Respondents were also provided numerous free-text fields to add comments, and they were asked for suggestions on improving communication and service. While the individual comments did not reveal any major themes to be noted for findings and recommendations, the team recommends █ █████████ review all comments for potential follow up with customers.

It is difficult to draw meaningful conclusions from the survey data around satisfaction with individual systems supported by █ . ██
████████████████████████████████████

In addition, the committee had difficulty determining how to interpret neutral responses (e.g. neither agree nor disagree, neither satisfied nor dissatisfied.) It cannot be determined from the data alone whether someone truly was neutral, did not have enough experience or data to form an opinion, or perhaps did not feel comfortable responding. We attempted to weigh the number of neutral responses in conjunction with all responses for a particular item and draw conclusions accordingly.

Overall, 97% of respondents indicated they are very satisfied or satisfied with their interaction with █ regarding those systems important to them and 82% of respondents indicated they received adequate communication from █ around the ████████ .

Findings and Recommendations

Finding:
A high percentage of respondents ██████ highly (83%+ agree/strongly agree/neutral) across most areas of their experiences ████████

Finding:
76% agree/strongly agree or are neutral that ████████████████ give sufficient feedback on the status of their request(s).

Recommendation:
Consider revisiting the frequency that status updates are provided to customers and ensure expectations are shared with customers.

Finding:
Only 50% agree/strongly agree or are neutral ██████ has sufficient staff resources to accomplish what is expected of them; 37% disagreed/strongly disagreed.

Recommendation:
Evaluate current staffing levels in relation to current and projected needs.

Finding:
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Finding:
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Finding:
Only 37% of respondents indicated satisfaction with the ███ process. Comments included being asked questions that they do not know how to answer and the length of time the process takes.

Recommendation:
Review the ███ process and consider revamping to address the concerns of the respondents.

Research Subcommittee #6 – Employee Survey

Description

The Employee Survey team utilized the Qualtrics tool to survey █ employees. The survey link was sent in early February and was available until February █. A reminder email to customers was sent February 9. Of the 44 surveyed, we received 23 responses. Survey categories gathered respondents' feedback in the following categories:

-Duties and Responsibilities
-Training and Professional Development
-Resources
-Leadership

Respondents were also provided numerous free-text fields to add comments, and they were asked for feedback and suggestions on project assignment, efficiency and effectiveness, areas of high performance, and areas for improvement.

Findings and Recommendations

Finding:
Respondents agreed or strongly agreed that they understand their duties, are familiar with the █ mission statement, and understand the role that █ plays at JMU.

Finding:
Twenty-two of the 26 respondents agreed or strongly agreed that they understood the ██████
████████. Three respondents were neutral and one disagreed.

Finding:
Respondents felt they had adequate knowledge to be successful in their jobs and felt there were adequate opportunities for additional training. There was less agreement that adequate time was allocated for training and professional development. It was noted by one respondent that workload "often preempts being able to participate in the offerings."

Finding:
Eight of 26 (30.7%) respondents felt there was not adequate staff available to successfully meet customer demand. The majority of respondents felt they had proper tools to be successful, are given a reasonable amount of time to complete projects and have the proper expertise to meet customer demand.

Finding:
Regarding ▇ resources, one respondent noted a perception that the department was "lean resource wise" while ▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇. One person suggested concern that other areas were getting resources and more collaboration might help dispel negative perceptions caused by this.

Finding:
Twenty-one of 26 respondents felt they received adequate guidance and/or support from ▇▇▇▇ ▇▇▇▇▇▇ and 22 felt the same way about ▇ leadership. In each case, there was disagreement or strong disagreement from one respondent. Eighty percent felt they are given clear instructions when assigned a project. Fifty-seven percent felt that projects were managed efficiently while 11.5% felt they were not. All but one was positive or neutral regarding the consistency of guidance/direction from leadership being consistent with the mission. One respondent noted receiving excellent support from leadership.

Finding:
When specifically asked about whether the current method for assigning project leaders and staff to projects was efficient and effective, the following themes emerged:
- Some are not sure of the effectiveness of the process or with the current method
- Some felt more time is required before determining whether the current assignment process works
- Many felt the process is working fine
- Overall there are mixed feelings about this question

Finding:
When asked what ▇▇▇▇▇▇▇▇▇▇▇ does well, the following themes emerged:
- Customer service, meeting customer needs, customer response
- Work/life balance
- ▇▇▇▇▇ for employees

Finding:
When asked for ▇▇▇▇▇▇▇▇▇ areas for improvement, the following themes emerged:
- Stakeholder accountability
- Compensation
- ▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇
- Ensure good partnerships with stakeholders; better collaboration across areas
- Communication improvements may be needed

Research Subcommittee #7 – Employee Focus Groups

Description

Once the employee survey data was received, the committee reviewed the findings and listed areas that required further investigation or "focus." Questions designed to clarify survey findings were listed, and

employees were invited to attend focus group meetings. Of the 44 employees invited, three agreed to attend. Focus questions related to the following topics:

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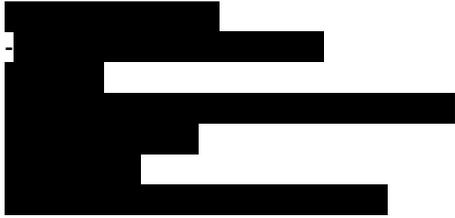
Findings and Recommendations

Finding:
Awareness of the ████████████████ varies. It seems that employees are generally knowledgeable about this. Employees suggested that knowing the bigger picture is helpful, but not essential. ████ in a bit of a reactive mode given all the demands being requested.

Finding:
Training is ████████████, including training that goes beyond technical. Two of the three participants felt that being out of the office for training and losing productivity could be a restraining force for some employees.

Finding:
When asked if more employees were needed, responses varied. The two employees who responded indicated that 2-3 people are needed in varied capacities.

Finding:
When asked what advice they would give about project management, the participants noted that we should make more strides in project management discipline and keep working on accountability, formal documentation, test cases, ensuring scope is clear, and acquiring buy-in from everyone. It was noted that project management is improving.

Finding:
Participants were asked how they felt communication could be improved. Respondents generally felt that it wasn't that bad and that efforts have been made. It was noted that it's up to each individual and individuals vary in their ability to communicate. They did suggest that 1) a central location to communicate changes that is searchable and 2) people need to use the process that are in place.

Finding:
Focus group participants feel they have all the ████████████████ they need to do their jobs.

Finding:
Participants noted that work-life balance is ████████, since employees work reasonable hours during the week and get weekends off. Even on-call hours are low compared to other places like in the corporate world.

Finding:
When asked what should be done to improve assignment of projects, respondents indicated:
- Do more cross-training
- ██
- ████████████████████████████████████

Finding:
It was suggested in the survey that more collaboration with stakeholders would be a good thing. When asked what really might work here, the participants indicated:

- Understanding ███████████ and getting good requirements
- Make sure ████ are more involved at the beginning

Finding:
When asked if there is anything else they would like to share, respondents indicated:

- More centralized █
- University-wide pay scale for people who do █ work
- Staff-fitness program tied to UREC
- ██
- Require people currently in departments to follow existing procedures before branching into new requirements

External Review

Finding:
Praise for the ████████████████ team was shared by the stakeholders interviewed. They were amazed by the amount of work that was accomplished by the team with limited resources. The █ team should feel proud.

Recommendation:

1. Meeting with the stakeholders on a monthly basis – the stakeholders believe these are valuable meetings and they are informative and helpful in planning initiatives.   The meetings should continue to focus on all of the ████████████
2. The stakeholders also thought the working relationships with the ████████ were excellent and they wanted to continue to be involved in projects.
3. The stakeholders agree that there needs to be a form for project review, evaluation and prioritization (currently the ████ ████ is used for this).   As you will see in the recommendations, a review of the ████████ should be conducted.
4. Understanding the limited resources- The stakeholders are very aware of the limited resources in ██.   The stakeholders feel focusing efforts on priorities on the student applications will benefit the students and advance the mission of university.
5. The ████████ thought the weekly meetings with the ████████████ ██████ were valuable in coordinating and planning.
6. Delivering quality service and uptime – the stakeholders said JMU and ██████ organization pride themselves on meeting high-quality customer service and project deadlines.

End User/Customer Feedback

Finding:
Getting feedback from the ████████, students and faculty to continue to improve services provided by ████████████████ and understanding how those services are being used.

Recommendation:
JMU already has surveys that they use and I would continue to informally survey users as they take advantage of the services provided by ████████████████, but I would also add usability testing to the

feedback process. ██
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can offer the students some type of small reward for participating like candy or pizza.
https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/

Staffing Retention/Skills/Training

Finding:
Recruitment and Retention – Several of the interviewees said that it was difficult to keep resources in
██████████████ Employees leave and go to departments or other schools for increased
compensation and more ██████████████████. James Madison University has █
██

Recommendations:
The ██████████ should evaluate these policies and build some guidelines for ████████████
employees. I would recommend starting with positions that lend themselves to alternate work schedules,
like ██. A recommendation would be to start
with positions that require limited user/customer interaction and require more dedicated, focused, and
concentrated technical efforts. ██████████████████████████████ are positions that
require long periods of single task work or research. Provide some guidelines on core hours of work (i.e.
everyone must be working 9:00 – 4:00, etc.). The █ leadership should make sure schedules are
published and available to the team and stakeholders.

Recommendation:
Another recommendation would be to do a telecommuting or alternate work schedule on a trial basis for 6
months and if it does not work, revoke the privilege. Providing telecommuting or alternate work schedules
would allow the team to feel they have some flexibility and it can also be more productive for the employee,
because they can get started earlier in the morning and avoid the commuting time to work. You should
ensure that the employee has an office environment at home. For the alternate work schedule, allowing
people to work four (4) ten (10) hour days or four (4) twelve (12) hour days one week and four (4) eight (8)
hour days the following week. Make sure you have Lync, Skype or other web tools to allow for effective
communication and sharing and have adequate access/bandwidth for remote work.

Finding:
Staff Development - The Executive Director of █ has █ direct reports, which is a large span of control.
Also there appears to be limited opportunity within ██████████████ for promotion. The █ organization
is also building a group of ██████████████ and also has ██████████████.

Recommendation:
A recommendation to consider would be continuing to build the project management skills and possibly
look at a project management office that could lead complex more strategic projects across the █
organization, but also redefine the ██████████████ role to include project management skills and possibly
more ██████████████ as well. This could allow for a tier structure for ██████████████ and also provide
the █ team with individuals that could lead smaller projects focused on the applications they support. This
would also provide promotional opportunities for the ██████████████ into ██████████████, providing
career opportunities and compensation for skills and levels of expertise.

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Finding:

[redacted] is an area where pooling resources is a big advantage since it allows for more level loading of development resources and more focused skills in the development and integration tools. It is also an area where the functional knowledge is not necessary as long as there are [redacted] [redacted].

Recommendations:

[redacted] It was not clear to me how this organization worked together, but it did sound like there were some position-tiers and opportunities for promotion from [redacted] to [redacted]. Developing relationships with the [redacted] and the [redacted] would allow for a better understanding of all initiatives and better resource planning. It would also allow for the technical analyst to get more involved working with the application managers in evaluating new functionality, something the stakeholders say they have very little time to do. The [redacted] [redacted] Another value of aligning the technical analyst more closely with the [redacted] is the help it provides with the hand-off from specification to development, something the stakeholders mentioned was ineffective at times today.

Finding:

[redacted] are also in the departments and currently serve as liaisons from their departments to [redacted]. Many of these individuals do testing, but do not look at new features and functionality delivered with the upgrades and bundles. The positions in the department serve as [redacted], report writers, and backfill for the department, so the skillsets are varied and training may not be as complete.

Recommendations:

Provide more resources in [redacted] that can work closely with the departments, but can also be responsible for helping implement and evaluate new functionality, help with reporting, and testing. Aligning these resources with the [redacted] would also provide some leadership for projects. If this cannot be done, then establishing clear roles and responsibilities and including the testing and training requirements for the [redacted] of the department should be incorporated in their position descriptions. Usually [redacted] has a better understanding of the implications of changes across modules than individuals working in the department, so having strong relationships with [redacted] and coordination needs to continue. Another value is that testing can be more tightly integrated across the modules and there may be opportunities for some automation of test scripts. The [redacted] in the functional units also felt they did not have sufficient reporting tools. Some of this is directly related to their training and lack of understanding of the underlying table structures. The [redacted] in the departments mentioned they do a lot of trial and error reporting. A value of having strong business analysts in [redacted] would improve reporting capabilities.

Recommendations:

As the [redacted] organizations continues to build a group of project managers, a recommendation is to communicate and share the value of those roles with the departments and stakeholders. There is some confusion that there are too many layers in [redacted] now, and requirements are often provided to several groups before development starts. [redacted] A recommendation is to provide some level of project management training to not only the [redacted] team, but also to the stakeholders. [redacted]

Finding:

James Madison University has a Rewards and Recognition Program: http://www.jmu.edu/humanresources/_files/salary-administration-plan.pdf.

Recommendation:
Promoting and rewarding individuals and teams for work, especially in the ████████████████ field, is a way to retain employees and reward teamwork. A recommendation would be to develop a budget for these rewards and some guidelines for █ managers. Continue to reward employees for certifications and new skillsets acquired, but add in rewards and recognitions for ███████ and initiatives.

Planning/Coordination/Communication of Priorities ████████ Assignments ████████/Collaboration between ████████████ and Stakeholders

Finding:
All of the stakeholders understand the need for the ███ or some type of request process, however transparency in the process for prioritization and how the ███ ties into the planning database is not clearly understood.

Recommendations:
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Finding:
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Recommendations:
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Recommendations:
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Finding:
Many stakeholders emphasized the need for continued and more formal communication on projects.

Recommendation:
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Appendices

(RAW DATA APPEARS HERE)