**OSU IT Workforce Planning**

**Project Charter**

Original approval date: February 2021 (Last rev: Apr. 2021)

**1.0 Background:**

A systematized and cohesive approach to talent management at OSU has been identified as a priority in OSU’s Strategic Initiative 4.0 (SP 4.0), specifically articulated in and influenced by SP 4.0.

Diagram

Description automatically generated

The goals of OSU’s talent management initiative (TMI) is to build a systematic approach to talent management that addresses the full employment life cycle to advance the mission of OSU by better attracting, developing and retaining talented faculty, staff and graduate assistants.

**2.0 Problem Statement and Case for Change:**

The goals of OSU’s talent management initiative (TMI) tightly intersect with the needs of OSU’s IT. As a result of University CIO, Andrea Ballinger’s 100-day assessment of OSU IT in early 2020, IT professional development was identified as one of 10 hot IT topics requiring further review as part of OSU’s IT strategic planning process. A task force was created to develop a set of recommendations for action on creating an IT Professional Development Program (PDP). At a simplified level, the task force identified several outcomes of a PDP, as well as a set of recommended next steps for developing a consistent professional development practice across OSU IT. Additional key findings within this area were:

* IT professionals have great skills and experience in their field.
* IT professionals actively interact with one another via several ongoing committees and events, such as the UIT plenary, IT Coordination Committee, and IT Pros.
* Leadership training is encouraged and broadly available to IT professionals.
* There are no formal career plans and/or professional development plans for IT professionals.
* There are no formal requirements for continuous improvement via innovative time.
* There are no formal requirements for IT leadership training, starting with a full understanding of university business.
* IT professionals need to feel they belong to the IT fabric of OSU regardless of where they report.
* Student employees may not see a roadmap for their professional careers within OSU.

In addition, three key problems surfaced within the area of IT talent management:

1. Talent acquisition and development approaches were found to be inconsistent between OSU IT units. Approaches are disjointed, and resource limitations fluctuate from one unit to another.
2. OSU IT employee’s understanding of the university’s related business practices were also found to be inconsistent.
3. While opportunities to strengthen individual leadership and soft skills are available to OSU IT employees, access to technical training opportunities is inequitable. These inequities are partly brought on by resource disparities between units, differing levels of expectations, and a lack of overall coordination, communication, and awareness between IT units and IT employees.

Due to these key findings, developing a structured and formal program that promotes the capabilities, diversity, and health of the OSU IT community has been established as one of 10 strategies in OSU IT Strategic Plan 2023. Within this strategy, the following projects have been proposed:

* Map the skills needed to begin and progress in formal and other IT roles.
* Provide access to the means of gaining these skills.
* Create individual formal talent development plans to track and support skill development.
* Provide training on culture and communication skills to aid self-examination and recognition of bias and how to promote a welcoming and diverse IT community.
* Create formal collaborations with for-credit instructional programs where OSU IT could offer experiential education opportunities to students.
* Revise IT policies and IT personnel practices, including hiring and evaluation, to address advancing diversity, equity, accessibility and inclusion.

Each of these proposed projects fall within the OSU TMI pinwheel (see 1.0 above), including both talent acquisition and talent development practices. The creation of an IT workforce plan is the first step toward addressing each area of talent management.

**3.0 Project Goals & Objectives**

The project team is charged with developing an OSU IT workforce plan. In doing so, the project team will develop, communicate, and implement a clear and consistent plan that’s in alignment with the OSU TMI, the performance management pilot project, and other related efforts. In this pursuit, the team will:

* Perform a current state analysis of OSU’s IT workforce
* Perform a future state analysis, aligning business strategy with IT workforce requirements
* Define the gaps against the future state
* Form an action plan and formulate a strategy using the data collected from the current and future states

**4.0 Benefits to OSU IT**

Benefits to the organization of the project are expected to include:

* Improved, holistic picture of IT positions across OSU. We’ll better understand what positions we have, invest in our people and work toward being a more diverse workforce.
* Limited talent gaps. We’ll be able to identify the skills needed in the future and create plans to meet those needs.
* Improved organizational productivity and efficiency. Through effective IT planning, appropriate resource allocation, we should be able to better manage the number of projects delivered on time and on budget across the board.
* Improved engagement, retention and advancement opportunities for IT staff. We’ll be able to help staff create individualized annual plans to improve skills and prepare them for advancement. This will also help to lower turnover costs by increasing an employee’s ability to be redeployed.
* Improved awareness of the number of positions and different classifications.
* Improved preparedness for OSU IT’s future and ability to forecast workforce-related challenges
* Improved awareness and support of the OSU IT Strategic Plan 2023

**5.0 Proposed Timeline**

* Preparations and Planning – Winter 2021
  + Develop a shared vision, identify opportunities, stakeholders, project scope, and project team.
  + Define the metrics we’ll use for tracking the project’s success.
  + Develop a project timeline.
  + Communicate the plan to ensure an inclusive approach.
* Perform a current state analysis & develop a future state picture – Winter/Spring 2021
  + Analyze the current state of OSU’s IT workforce
    - Identify classified and unclassified roles
    - Identify current competency levels of the OSU IT workforce
    - Consider workforce trends & organizational culture factors (e.g. demographics, HR metrics, etc.)
  + Analyze the future state of OSU’s IT workforce
    - Share the current state analysis with members of OSU IT to help develop the future state
    - Assess external workforce trends & factors (e.g. talent trends, social patterns, etc.)
    - Identify the impact of trends on current and future workforce (e.g. comparison data against our industry, etc.)
    - Identify impacts of OSU’s IT strategies and roadmap on our workforce
* Identify Gaps & Formulate Strategies – Summer 2021
  + Identify skills gaps between the two states
  + Formulate a strategy to reach the future state
  + Coordinate our workforce planning & skill development with IT project/portfolio management office
  + Complete a written IT workforce plan report that includes the current state analysis, an explanation and description of the future state, and recommendations to address the gaps
* Planning & Implementation – Fall 2021 & Beyond
  + Identify potential working groups to take the recommendations from the plan and put the plan into action.

**6.0 Scope**

The scope of this IT workforce plan includes (a) current classified and professional faculty IT positions at OSU, (b) members of the OSU IT Pros distribution list, and (c) staff who are both members of an OSU IT unit and in positions that directly support IT. At this time, we will not be factoring in student and temporary employees. Academic faculty (e.g. Research Associates/Assistants) whose jobs fall outside of our project scoping criteria mentioned above will also not be included in this initial plan.

**7.0 Estimated Resources**

This effort will require dedicated time and effort from the project team to plan, perform the analysis, and build the plan, including providing recommendations for the next steps and actions. Resource constraints apply and unlimited resources are not available. That said, this project is viewed as a high priority by OSU IT. To that end, resource needs brought to the Project Sponsors will be carefully considered and reasonable requests will be submitted. The project team is adopting the Info-Tech methodology for creating an IT workforce plan.

**Link to the Info-Tech methodology**: [Build a Strategic IT Workforce Plan Phases 1-3](https://oregonstate.box.com/s/fy20l67lijlc18a00xh71q96g07csv38)

**Project Sponsors**

* Andrea Ballinger, CIO & Vice Provost, Information & Technology
* Cathy Hasenpflug, Associate Vice President & Chief Human Resources Officer

**Project Team**

1. Scott Emery – Director, IT Organizational Development, UIT-BA
2. Jared Haddock –HR IT Strategic Partner, UHR
3. Sean McGlothlin – Analyst/Programmer, UIT-DA
4. Polly Millet – Performance Management Program Specialist, UIT
5. Kyle Ribacchi – Operating Systems/Network Analyst, College of Business
6. Carolyn Rothwell – Senior Product Manager, UIT-BA
7. Judi Saam – Analyst/Programmer, Office of Global Affairs
8. Terralyn Vandetta – Director, Forestry Computing Resources, College of Forestry
9. Bill Weber – Director, Talent Acquisition, UHR

**Stakeholders**

* Talent Management Senior Advisory Group
* University Human Resources
* OSU IT
* Office of Institutional Diversity
* Equal Opportunity & Access
* Provost, VPs and Deans (shared via CIO/VP and exec sponsor, Andrea Ballinger)