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Background

The Further and Higher Education (FE and HE) sectors continue to witness significant investment in ICT to support education, administration, community engagement and research. These investments can range from general developments in underlying ICT infrastructure to the on-going support and maintenance of specialist software applications. Clearly it is important for institutions to be able to assess whether value for money is being achieved from these investments and to be able to base future decisions on an informed understanding of the impact of prior investments. The JISC-funded Benefits of Investment in ICT Landscape Study (BIILS) based within the University of Strathclyde sought to address this issue by exploring current practice within the sector, investigating best practice and examining lessons learned from approaches used in other sectors.

The first phase of the BIILS Project ran from May 2008 until September 2008 and the main output was an Evaluation Toolkit designed to aid managers and practitioners in the sector to compare and contrast evaluation techniques that can be applied to inform decision making on appropriate approaches for different types of investment. JISC then funded this second 'Benefits Realisation' phase to take forward the recommendations made at the end of Phase I

Aims and Objectives

The overall aim of the BIILS Project Benefits Realisation (Phase II) was the validation of the BIILS Evaluation Toolkit in order to embed its use, thus ensuring take-up of the original work. In addition, this realisation of benefits phase aimed to add to our knowledge of the issues and build on the existing project outputs by adding more context, thus enhancing the evidence of their usefulness. Specifically, the project aimed to:

1. Conduct a consultation exercise, piloting the toolkit with three sites
2. Develop detailed cost-benefit analysis case studies with the three sites
3. Refine the BIILS Framework and toolkit based on findings from the above.

Methodology

1. Consultation Exercise
The project team planned to conduct a cost-benefit evaluation with three HE/FE pilot sites in order to apply the BIILS Project toolkit in context for specific ICT investments. This involved initial consultation via telephone and email to gather information and establish requirements, following which the BIILS Project team developed workshop content suitable for each individual context in order to deliver a workshop tailored to requirements.
2. Detailed Case Studies
Based on the workshops carried out, three detailed case studies of cost-benefit evaluation were written up to provide an in-depth picture of investment evaluation at institutions.
Refine Framework and Toolkit
3. Revise Evaluation Toolkit
The toolkit originally developed in 2008 for the BIILS Project was then revised based on findings from the consultation and case study development carried out.

Implementation

The toolkit was revised following the three pilot workshops and their write up into 3 case studies of cost benefit evaluation, focusing on non-financial benefits of investment. Each of the three case studies had a different focus and workshop content based on their nature and the requirements of participants.

1. Leeds Metropolitan University

Project staff at Leeds Metropolitan University are involved in reviewing academic services along with academic colleagues and those from Information, Media and Technology Services. They are investigating the potential benefits and issues associated with a service oriented architecture for delivery of services such as those provided by the university portal, VLE and Library systems, and are currently procuring a new portal which will incorporate a VLE. In addition, an e-portfolio tool is being selected and this is being led by academic staff – a new approach.

The work at Leeds Met is being carried out as one of JISC's Flexible Service Delivery (FSD) projects and as part of this they have convened a strategic technologies group to examine the costs and benefits of a service-based approach. Leeds Met was provided with support for a cost-benefit exercise from the BIILS Project Team via a workshop based on outputs of Phase I of the BIILS Project. For the purposes of this workshop, the focus was on *one* of the systems under review – the proposed new university portal which also incorporates a VLE. Leeds Met can now use a similar methodology for investigating the costs and benefits of the other systems under review if appropriate. Work done prior to the workshop by Leeds Met involved costing for the new portal system, however this was strictly based on the additional costs for required capital equipment only. The workshop aimed to provide support for more thorough and accurate costing and also to provide a comprehensive way to investigate and evaluate the benefits so that value for money could be considered as a major aspect of the decision making involved.

2. University of Oxford

Oxford University Computing Services are leading 2 JISC-funded FSD projects from the <£20k strand. Computing and faculty staff are responsible for TRAC-related work (Transparent Approach to Costing) and Student Services is investigating a service oriented architecture approach.

JM Consulting will be involved in helping Oxford investigate and cost three of the IT services hosted by Oxford University Computing Services using TRAC methods. JM Consulting frequently advises JISC and HEFCE on TRAC and are considered experts in this area.

Oxford has a devolved IT structure, however has recently moved to a central service for Exchange and SharePoint, with many of the local systems shutting down. This project finished at the end of March and was considered a good focus as Oxford has conducted lots of user surveys, therefore had evidence to draw on when considering benefits. In addition, a business case for investment is normally made at the outset at Oxford, therefore appropriate information was available to use at the workshop.

The BIILS Project workshop was carried out prior to the full cost investigation with the consultants. As the cost elements of the workshop would be much more 'light touch', it was deemed to be more beneficial to carry that out first as it could potentially feed into the planned full costing exercise. Secondly, as the full costing exercise would be done later anyway, the workshop focused more on evaluating the benefits to allow value for money to be considered as soon as the full costing exercise is done with JM Consulting. The workshop also covered 'hidden benefits' whereby benefits not identified in a business case are realised.

3. PiP Project – University of Strathclyde

The PiP (Principles in Patterns) Project at the University of Strathclyde relates to curriculum development. Its aims are to analyse and improve the curriculum approval workflow at the University of Strathclyde and to develop supporting resources and materials to help staff members involved in curriculum design and approval decisions. The project was 18 months into its 4 year duration and there was at that point a pressing need to review and address evaluation in relation to the university and what benefits the project will deliver. The BIILS project team reviewed the PiP Project's evaluation requirements and developed a workshop to be delivered in

order to review all project benefits and how to evaluate if and to what extent they are being realised as the project progresses. Evaluation covered the changed business processes in relation to curriculum approval as well as potential investment in technology. Note that although the first phase of the BIILS Project was investigating benefits evaluation for *ICT* investments, the focus of this workshop was widened to include all PiP project activities; not just development of its online development tool. The BIILS Project team viewed this workshop as an opportunity to test the BIILS framework more widely.

Outputs and Results

The project outputs were the workshops themselves, conducted with Leeds Metropolitan University, Oxford University Computing Services and the Principles in Patterns Project at the University of Strathclyde, the case studies written up following the workshops, which are attached as Appendix One of this document, and the revised BIILS Project Toolkit which is published as a separate document. Based on the workshop outcomes and feedback, only minor revisions to the toolkit were required, including advice on combined 'types' of investment, advice on non-ICT investments and addition of more recent references.

The BIILS toolkit covers calculation of costs, identification of benefits and appropriate methods of evaluation to review if and to what extent benefits will be/are being/have been carried out. These 8 evaluation methodologies were derived from information gathered from a literature review and a survey of HE and FE in Phase 1 of the project. The toolkit also lists indicative benefits for different types of investment. Again, these were derived from the work carried out in Phase 1 and were used as a starting point for discussion at all three workshops to good effect. Where the case study investments were deemed to be a combination of 2 different investment types (in Case Studies One and Three), both indicative benefits lists were used. There were no evaluation methods identified and discussed during the workshops that did not fit into the 8 evaluation methodology types in the BIILS Toolkit and these were found to be comprehensive and useful by all 3 case study sites. As costing was required in Case Studies One and Two, the BIILS Toolkit was used to provide information on investigating costs, and actual costs for the investments were collated during the workshops. Benefits were identified and assessed in terms of importance and potential or actual realisation for all three workshops. Finally, BIILS evaluation methods actually used or appropriate for potential use were identified for all benefits at all 3 workshops. As costing had not been required for the third case study, this left time and scope to further examine evaluation methodologies and participants were able to discuss what specific forms evaluation would take. Key issues with evaluation were discussed with all 3 case study sites and a cost-benefit analysis was provided based on workshop discussion for Case Studies One and Two. For Case Study 3 an analysis of benefits was provided as they had already identified project costs and were not in a position to begin investigating potential future costs should project outputs be taken forward in the future. For all 3 case studies, the analysis provided was the first stage of an iterative approach and is intended to be further revised with, for example, further information or input from additional stakeholders.

Outcomes

The overall aim of the BIILS Project Benefits Realisation (Phase II) to validate the BIILS Project Toolkit was achieved via the three workshops. Participants and their projects and institutions benefitted from the cost and benefits analyses conducted and are planning to build on the outcomes.

Based on the workshop experience and the feedback received, the BIILS Project Toolkit was revised and improved for continued use in the HE and FE sectors.

Conclusions

The BIILS Project Toolkit was tested via three pilot workshops with a range of investment types. There were no conflicts of note and the toolkit catered well for non-ICT aspects of investment relating to the PiP Project. The project has provided an opportunity for the BIILS Toolkit to be tested across a range of institutions and investments and the feedback from participants was very positive; only very

minor revisions to the framework were required. Consequently the project team has concluded that the toolkit is of value to those in the HE and FE sectors for investigating benefits of investment and their evaluation. The project team will therefore continue to disseminate the BIILS project outputs and findings.

Although the toolkit and BIILS Project Phase I findings contributed well to the cost and benefit analyses carried out, the value of the workshop approach was highlighted by participants. The value of the *process* of actually conducting such analyses must be stressed, and the participants from all 3 workshops commented on the importance of convening appropriate stakeholders and setting aside a designated time to carry this out.

Implications

As commented previously, the findings of this phase of the project is that the BIILS Toolkit can be used to effectively frame cost/benefit analysis of ICT (and non-ICT) investment. The value of the workshop was highlighted by participants; that although project materials are freely available, having a facilitated workshop is of great value and helps to fully maximise the benefit of the toolkit. The project team recommends that JISC explores the market for provision of facilitation for such workshops. Workshops could include selection of appropriate tools for conducting cost-benefit analyses as well as reviewing evaluation methods for benefits as covered by BIILS.

The project team will be taking this forward by conducting a workshop based on BIILS at ALT-C 2010.¹

Appendix One – Cost Benefit Evaluation Case Studies

(Attached as separate file – note that confidential cost information has been removed from the case studies for publication)

¹ <http://www.alt.ac.uk/altc2010/>