Governance for Business Intelligence (B.I)
The University of Texas at Austin's Success Story
Longhorn Facts

✓ 52,000 Students
✓ 12,000 Degrees Awarded Annually
✓ 17 Colleges
✓ 2,500 Faculty
✓ 14,000 Staff
✓ $2.1+ Billion Budget
✓ $640+ Million Research Funding
Information Quest (IQ) Charter / Purpose

IQ is an enterprise-wide business intelligence initiative that provides

- **Accurate** and **Flexible** analytical **tools**
- Management **information**
- Supporting **University leaders** in **making** data-driven **decisions**
Understanding The Audience – A Quick Poll
Pause For Audience Goals
Objectives Of This Presentation

1. Define Governance
2. Survey UT Austin’s Governance Model and Processes
3. Share other Success Dependencies beyond Governance
4. Review a success story and a not-so successful story
Governance Defined

Wikipedia:

■ Relates to consistent management

■ Cohesive policies, guidance, processes and decision-rights for a given area of responsibility

TDWI:

■ The development and integration of a set of rules (policies, guidelines, and standards) for managing the corporation’s assets (i.e.: Data)

■ Provides a link between technology and business and common language and understanding of shared business data.

■ Facilitates the development of business around that data.
IT Governance For UT Austin IT Community (including the BI Group, aka IQ)

Provide strategic leadership, establish campus-wide IT priorities, and be accountable & transparent
Basic Ingredients Of A Good Governance Model or Structure

1. Decision-making bodies a.k.a Governance Groups
2. Decision areas (for each Governance Group)
3. Documented Policies & Guiding Principles
4. Oversight mechanisms
Basic Ingredients Of A Good Governance Process

1. Periodic establishment, assessment, and refinement (as needed) of Priorities and Progress.

2. High Trust and Open Communication among parties across Governance Groups.

3. Balance and Wisdom about methods of communication used, e.g., in person, video-conf., phone, email, text, etc.

4. Leaders that work hard, focus on other’s needs, and are highly talented in the BI field.
In Summary Good Governance Should Provide Context for:

❖ What decisions need to be made?
❖ Who will make those decisions?
❖ How decisions be made & implemented?
❖ How decisions will be monitored?
Where “Governance” happens the most (Methods and Decisions)
UT Austin - IQ Governance Pyramid
Executive Level Governance Group

1. Decision areas
   - Resolve strategic budget and resource issues

2. Guiding principles / Policies
   - Crawl, Walk, Run
   - Start small and grow in manageable increments
   - Keep investments in line with results
   - Leverage existing transactional systems

3. Oversight mechanisms
   - Semi-annual updates and Annual planning
UT Austin - IQ Governance Pyramid

Strategic Level Governance Group

1. Decision areas
   - Prioritize deliverables within subject area, resolve strategic issues and elevates issues as appropriate
   - Review completeness, accuracy and timeliness of data

2. Guiding principles / Policies
   - How the B.I project/program should advance?
   - IQ Outreach
   - Providing inspiration and challenges

3. Oversight mechanisms
   - Weekly Sponsor meetings. Stewards & sub-committees meet as needed
1. Decision areas
   - Infrastructure, resource and capacity planning and monitoring

2. Guiding principles / Policies
   - Define project results, plans and scopes in detail
   - Getting the right people involved
   - Establishing a change management procedure

3. Oversight mechanisms
   - Weekly meeting within team and with SME/Data owners
UT Austin - IQ Governance Pyramid

Executive Governance
- Executive Sponsors
- Steering Committee

Strategic Governance
- Project Sponsors
- Sub-Committee(s)
- Data Steward Committee

Implementers
- SME / Data Owners
- B.I./DW Team

Where Governance Happens (Methods and Decisions)

Monitoring
Strategic / Types of Decisions
Other Key Factors for UT Austin (Beyond Good Governance)

- **Overall Vision**
  - Provide Operational and Strategic information to Deans, VPs and other Leaders
  - Crawl, Walk and Run Approach
  - Start small and grow in manageable increments

- **How it has helped:**
  - Keeps focus on community leaders and off central administrators. Also helps focus resources/security.
  - Helps keep focus on quality over speed.
  - Helps ensure that a positive ROI is always in mind and achieved.
Other Key Factors to Consider (Beyond Good Governance)

- **IT/Business Environment**
  - Centralized vs. Decentralized
  - How is Central IT works on your campus?
  - Homegrown systems vs. ERP Packaged Software
  - Current Sources of Resource Availability

- **Stakeholders**

- **Funding Model**

- **What these factors affect:**
  - Technical Tools/Decisions needed
  - Types of Technical and Non-Technical Human Resources needed
  - Ability to Enhance
  - Data Integrity Processes
  - Communication Frequency/Methods
  - Availability of Data
  - Nimbleness/Speed
Since FAQ – More Info on IQ Funding Model

- Centrally Funded, No funding from Colleges
- Hardware Infrastructure Funding – Annual One-Time Funding from uncommitted debt proceeds
- Very transparent reporting of every dollar that comes in and what the community gets in return
IQ (Before and After)
The Results of the UT Austin Governance Model & Processes

• Talented Staff and Key Roles

• Data is Reliable, More is Available, and it can be readily Enhanced

• Commitment and Culture among Customers, Project Leaders and Stakeholders continues to be solid.
2002:

Fred
Associate VP and Controller

Cathy
Director of IQ

Barbara
(Subject Matter Expert)

Vijay
Data Architect

Lisa
(Part Time Project Manager)

2 FTEs
ITS Systems Analyst (Temp)

IT Stewards

IT infrastructure Specialists
(On Demand/Request Basis)

Total: 5.5 FTEs (3.5 FTEs Dedicated, 2 FTEs Temp)
Talented Staff and Key Roles

2011:

Fred
Associate VP and Controller

Vijay
Director of IQ

- B.I. Team
- QA/Training
- IT Stewards

Robert
Infrastructure Lead

- ETL Team
- System Admins / DBA
- IT infrastructure Specialists (On Demand/Request Basis)

Total: 14 FTEs
Data Availability and Ability to Enhance

- Financial Info
- Alumni/Donor Info
- Student Info
- Research Info
- Facilities Info
- Human Resources Info
- Faculty & PBIS Info
Data Availability and Ability to Enhance

- Student Info
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Commitment, Unity and Culture of Project Leaders (Before and After)

Leaders must:

- Be 100% committed to B.I role. Lower the commitment, lower the productivity.
- Share the same passion for what the B.I group is trying to accomplish.
- Be responsible and other-centered, not just with customers but with team members they support.
Success Story

- Financial/HR Cubes
- Stakeholders
- IT / Business Culture
- Vision

- # of users /
  Usage / Impact / ROI

- Date of Release To Production: May 2004
Not-So Successful Story

- Research/NSF Cube
- Stakeholders
- IT / Business Culture
- Vision

Date of Release to QA/Data Validation: Dec 2003