

Announcing ITIL Training Support for South African Higher Education IT Departments

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Summary of this announcement: TENET will make substantial funds available, under the umbrella of its DITCHE program, to make extensive training in ITIL possible for IT Departments in South African public higher education in 2007-2009.

1. Why ITIL?

ITIL (the Information Technology Infrastructure Library) is a vendor-neutral, universally accepted standard for IT Service Management and Service Delivery with a worldwide implementation footprint, including extensive deployment in higher education. The standard has broad applicability in any IT context and is expected to be particularly useful for institutions that have recently undergone mergers, since it provides a common language and a common set of process descriptors that have application across organisational cultures.

The South African community of IT directors, through the Association of South African University Directors of Information Technology (ASAUDIT), have signalled near-unanimous support for this initiative during the planning stages, and TENET intends to apply donor funds – generously made available by the Andrew W. Mellon Foundation – to fund this initiative, which is expected to run from mid-2007 to the end of 2009. A key outcome will be the development of a cross-institutional community of practice, speaking a common process language, which DITCHE will support further through online tools, events and seminars in parallel with formal training.

2. The process

A key target will be to expose **35% of the staff of the central IT department in certification-track training** (the ITIL Foundation Certificate). Most of the cost of this will be borne by DITCHE, on the basis of a calculation that depends on the size of the institution and the average size of all participating institutions. The principles are as follows:

- For IT departments smaller than 35% of the average size: DITCHE will provide funds to train all the staff at foundation certificate level. The institution may elect to train fewer than 100% of its staff but DITCHE would not encourage it to train significantly fewer.
- For IT departments between 35% and 100% of the average: DITCHE will provide funds to train a number of staff equal to 35% of the average, at foundation certificate level.
- For IT departments larger than the average: funding will be made available on a sliding scale in which the institution must make some contribution to funding, ranging from very little, for those close to the average, to around 40% for the very largest institutions (with more than 160 staff). **No expenditure of institutional funds will however be necessary in 2007**, though appropriate budgetary commitments for 2008 will need to be made. The precise formula that is used in calculations is explained in the appendix to this announcement.

In addition, **all participating institutions will commit to training, at their own expense, 10% of their foundation trainees to the ITIL practitioner level**, in phase 2 (2008 - 2009).

Some examples of how this works in practice are given below. These examples assume that the average IT department has 46 technical staff.

- Institution A has seven staff. 35% of the national average is 16, so Institution A can have all its IT staff trained at DITCHE expense in phase 1. If it does so it will undertake to train one staff member at practitioner level in phase 2.
- Institution B has 27 staff. DITCHE will fund the training of up to 16 staff in phase 1. In phase 2 the institution will fund the training of 2 of those trained in phase 1 for practitioner level training.
- Institution C has 62 staff. This is larger than the hypothetical national average, but not much larger. DITCHE will fund the training of 20 staff in phase 1 and the institution will fund 2, to make 22 staff (which is 35% of 62). In phase 2 the institution will fund the training of 3 of those trained in phase 1 for practitioner level training (2.2 rounded up.)
- Institution D has 95 staff. This is considerably larger than the hypothetical national average. DITCHE will fund the training of 24 staff in phase 1 and the institution will fund 9, to make 33 staff (which is 35% of 95). In phase 2 the institution will fund the training of 4 of those trained in phase 1 for practitioner level training (3.3 rounded up.)
- Institution E has 157 staff, making it one of the largest in the country. DITCHE will fund the training of 27 staff in phase 1 and the institution will fund 28, to make 55 staff (35% of 157). In phase 2 the institution will fund the training of 6 of those trained in phase 1 for practitioner level training (5.5 rounded up.)

Additional commitments:

All participating institutions must be willing to make venues available for training. This may include training for staff from other institutions.

3. How to enrol

TENET will invite all institutions to make a bid for training funds. The bid must state the name of the designated contact person, must state the staff size of the IT department, and must state the number of staff that it proposes to enrol in the program. On the basis of these bids TENET will make firm offers to institutions, the acceptance of which will constitute a contract in terms of which the institution undertakes firm commitments of its own. At minimum this will involve some practitioner training commitments in 2008 and/or 2009. It may also involve some foundation training commitments as well, as outlined above.

4. Questions and answers

My institution has 30 staff and you're offering to train 16 of them, but we don't want to send them all on training. Can we train only 11?

This is up to you – but the funding is pitched in this way to make it possible for smaller institutions to benefit proportionately more than larger ones.

My institution has 40 staff but we only want to train 3 of them with DITCHE funds. Is this possible?

No. We judge that without sufficient critical mass – and 35% is a “sweet spot” for this purpose – it's not worth embarking on this exercise.

My institution has 80 staff but we'd like to send them all on foundation training at DITCHE expense. Is this possible?

Bids for training of more than 35% will be considered, but only after all other training needs have been assessed and budgeted for. In any event, all such training over the basic 35% will be funded, if at all, according to which how the institution stands in relation to the national average – the larger the institution, the smaller the proportion of trainees that DITCHE will fund.

Who will be delivering the training?

HP. They are the world's largest trainer in IT service management, and TENET has negotiated a very favourable arrangement that will take maximum advantage of their worldwide training profile, including a significant contribution to building a virtual community of practice to sustain this initiative into the future.

Can we use another trainer?

Not for the contractual portion of the training. But you could use another trainer for any additional training, outside of this arrangement, that you wanted to make.

Will DITCHE fund the cost of exams?

No. There's too much variation among institutions in HR policy on this, so the cost of examinations is outside this proposal.

Do staff who undergo training have to write the exams?

Staff who are destined for practitioner training will have to write and pass the foundation certificate exam. For all others, we encourage but do not require certification.

What happens if staff leave after training? Can we send new employees on training mid-way through the program?

TENET will consider such requests sympathetically, but without any guarantees.

We have no training budget at all for 2007. Can we still participate?

Yes, provided you're willing to make any commitments generated by the formula for 2008 or 2009. Even in the best-funded scenario for relatively small institutions, you'll have to send at least one person on practitioner training in 2008 or 2009.

What happens if we fail to meet our own budget commitment in 2008 or 2009?

The agreement between TENET and your institution will take the form of a written contract – failure by an institution to meet its commitments will make all money spent by TENET on that institution repayable.

5. Next steps

TENET staff will conduct a briefing on this program at the ASAUDIT meeting in early March. Thereafter, once any issues arising from that meeting have been dealt with, we'll issue a formal invitation to participate to all South African public higher education institutions. All institutions are welcome to submit an expression of interest immediately, specifying in particular their technical staff headcount.

Appendix: formula for calculating DITCHE contribution

The following formulae are based on the numbers of technical staff in the central IT department and apply to foundation level training only.

x is the average size of IT departments for all institutions

y is the size of the IT department for which calculation is made, counted as technical staff in the central IT department

t is 35% of y i.e. it is the target for training for the institution.

i is a benchmark number equal to 35% of x – that is, it's the same as the target value for the “average” institution.

For institutions less than or equal to the average institutional size, DITCHE will fund i .

For institutions greater than the average, DITCHE will fund:

$$\frac{x}{y}(t - i) + i$$

Or, expressed differently, DITCHE will fund every institution to a basic level equal to 35% of the average; and for those larger than the average, it will contribute a diminishing proportion of the funding necessary to achieve the 35% training target, based on the relationship between an institution's size and the average size.

Questions or comments should be directed to dbg@tenet.ac.za.