IT Service Ownership in Higher Education
 Definitions, Applications, and Benefits

EDUCAUSE WORKING GROUP PAPER

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# Table of Contents

Introduction ................................................................................................................................. 3  
Defining Service Owners and Service Offering Managers ................................................................. 4  
Selecting Service Owners and Service Offering Managers ................................................................. 5  
  Selecting SOs ............................................................................................................................. 6  
  Selecting SOMs .......................................................................................................................... 6  
Activities and Responsibilities ........................................................................................................... 6  
  SO Activities ............................................................................................................................... 7  
  SOM Activities ........................................................................................................................... 10  
Potential Challenges ........................................................................................................................ 12  
  Structure and Culture .................................................................................................................. 12  
  Resources and Tools ................................................................................................................... 13  
What’s Next? Suggested Action Plan ............................................................................................... 14  
Authors ......................................................................................................................................... 15
This paper presents a model for organizing service ownership and management responsibilities to improve higher education IT organizational effectiveness. It provides a framework and guidance for defining, implementing, and benefiting from service owner and service offering manager roles at your institution and within the ITSM service life cycle.

Introduction

Many higher education IT organizations have adopted IT service management (ITSM) tools and practices to help transform from technology-oriented to service-oriented organizations focused on facilitating institutional outcomes. While many IT organizations have defined their services in an IT service catalog, the role of service owner is frequently not well understood. In addition, applying guidance from IT service management literature such as ITIL in higher education requires substantial investment in time and resources. As a result, roles and responsibilities critical for the alignment of services with institutional goals and for the delivery of services according to agreed-upon levels are not optimized in our organizations. This paper is about the definition, roles, and responsibilities of service ownership in the context of higher education IT.

This paper presents a model for organizing service ownership and management responsibilities to improve the IT organization’s effectiveness by introducing the concept of the service offering manager (SOM) role in addition to the traditional service owner (SO) role. Identifying SOs and SOMs and defining their responsibilities at your institution are key steps to effectively managing and delivering IT services. These roles are responsible for IT services at all levels—from engaging with partners and ensuring that services meet institutional business needs, through enabling day-to-day functions to service strategy and continual improvement. All of these activities contribute to the overall experience and satisfaction of our community.

This paper is primarily intended for the use of IT leadership, IT service management architects, service catalog managers, and persons in SO and/or SOM roles.

This paper:
- Defines service owner and service offering manager roles
- Recommends service owner and service offering manager responsibilities
• Identifies key activities for each role, including in the major phases of the service life cycle
• Presents guidance for selection of staff for these roles
• Discusses potential challenges in service ownership

This paper does not:
• Define a rigid organizational structure for service owners and service offering managers
• Rely upon a specific service catalog data or presentation structure
• Define criteria for evaluating the performance of service owners and service offering managers
• Revise best practices, which have already been defined in previous EDUCAUSE papers

Developing an IT service catalog and integrating it with your organization’s processes is an excellent step on the road to leveraging IT service management for your organization. We recommend adopting and defining an IT service catalog in advance of, or concurrently with, defining these roles for your institution. For a high-level introduction to IT service management and the service catalog, please see the EDUCAUSE working group papers Demonstrating Value Through IT Service Management in Higher Education and The Higher Education IT Service Catalog: A Working Model for Comparison and Collaboration.

**Defining Service Owners and Service Offering Managers**

Defining a service owner helps organizations delegate accountability for a service throughout the service’s life cycle. Service owners leverage their understanding of strategy, business value, and technology capabilities to help ensure that the IT service is meeting the business needs of the institution. Service offering managers, then, are responsible for the operating of the service offerings under each service and contributing ideas to the service owner in support of service strategy. In some cases, each of these roles may be filled by dedicated positions, while other institutions may have the same individual both owning the service and operating the offerings under each service. Having someone in this role or these roles can help establish service governance, make decisions about resources, and balance the business value with the technology capabilities of the service. The definitions...
below capture the essence of each role and can be used as a jumping off point for institutions looking to formalize these roles.

- **Service Owner (SO):** The service owner is accountable for the delivery of an IT service and the service offerings within. The purpose of this leadership role is to ensure that the service receives strategic attention and appropriate resources to support the mission and needs of the institution. The SO is responsible for the service as a whole through its entire life cycle and is accountable to the person in charge of overall IT service delivery. The SO’s accountability for a service is independent of where the underpinning technology components, processes, or professional capabilities needed to deliver the service and its offerings reside.

- **Service Offering Manager (SOM):** The service offering manager is responsible for the delivery of an IT service offering. The purpose of this role is to ensure comprehensive, efficient, and transparent management of and communication about the IT service offering in accordance with the service strategy. This role is accountable to the SO for the design, implementation, and ongoing maintenance and support of the offering. As with the service owner, the SOM’s responsibility for a specific service offering is independent of where the underpinning technology components, processes, or professional capabilities reside.

### Selecting Service Owners and Service Offering Managers

The process for selecting service owners and service offering managers may vary from institution to institution. Depending on your level of ITSM maturity, your institution may already have a process in place to select people for these roles. For some institutions, there may be an ITSM governance group in place to select the appropriate individuals. In others, the CIO may determine who fulfills these responsibilities. SOs and SOMs should think about and manage service delivery holistically within the framework of the organizational strategy. As these roles are cross-functional, relationship building is a critical skill for both SOs and SOMs.

The following guidelines can be used in your institution when selecting service owners and service offering managers.
Selecting SOs

Service owners are assigned at the service level and are typically IT organization leaders. SOs should be strategic, critical, and creative thinkers who understand the value to the institution of services provided and can effectively balance competing strategic priorities.

Service owners should be highly effective communicators, as they will often interact with academic and administrative executives, IT staff, and other stakeholders. It is important for SOs to have the ability to build trust and foster relationships across these groups.

Finally, SOs need sufficient authority and visibility to be able to fulfill the needs of their role. The easiest way to ensure that is if they already have these as part of their hierarchical position—for instance, if they report directly to the CIO or executive IT leadership. Otherwise, authority will need to be borrowed or formalized in some other way.

Selecting SOMs

Service offering managers are assigned at the service offering level. They should be critical thinkers who understand the people, products, partners, and processes involved in delivering their service offering. Service offering managers understand the dependencies of their service offering, as well as what other services depend on their offering.

Like SOs, SOMs need strong communication skills because they are often called on to facilitate discussion between partners and technical staff. Depending on the service offering and organization involved, they might also provide technical leadership for their service team, particularly in the areas of problem management and continual service improvement (CSI).

In cross-functional service teams the SOM needs to be able to pull diverse resources together into a cohesive whole, working together with an eye on the desired outcomes of the institution. That could be done by means of relationship building, or by authority, or by some combination of the two.

Activities and Responsibilities

Throughout the service life cycle, the responsibilities of SOs and SOMs will vary and shift. Early in the cycle, an SO will be more active in defining the strategy. As
the service is deployed, an SOM will take a more direct role in implementing this work. These roles work together for the life of the service to sustain, continually improve, and eventually retire service offerings. As a general rule, SOs operate at the strategic and tactical levels, while SOMs operate at the tactical and operational levels.

Please note that these two roles may be filled by the same person. This will vary based on an organization’s size and culture, the type and scale of service, and the individual staff. Furthermore, the size of an organization should not determine whether this work is done, though it might affect the extent to which these activities are carried out. A successful service will have all of the components identified in figure 1.

Figure 1. SO and SOM roles in service life cycle phases

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Design</th>
<th>Transition</th>
<th>Operation</th>
<th>CSI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand the community and their needs</td>
<td>Identify or create the solution</td>
<td>Implement and adopt the solution</td>
<td>Support and sustain the service and its offerings</td>
<td>Continually align the service with the needs of the community</td>
</tr>
<tr>
<td><strong>Service Owner</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategic leadership, roadmap, analysis, business model</td>
<td>Expectations, metrics, service levels, resources</td>
<td>Marketing and customer relations</td>
<td>Risk management, resource allocations</td>
<td>Service reviews</td>
</tr>
<tr>
<td><strong>Service Offering Manager</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contribute ideas and info</td>
<td>Operating agreements, business model</td>
<td>Marketing, communications, training, organizational change management</td>
<td>Vendor management, metrics, reporting, community advocacy</td>
<td>Service reviews, enhancements</td>
</tr>
</tbody>
</table>

**SO Activities**

Service owners are the primary advocates for their service and are involved in all stages of the service life cycle, accountable for the end-to-end service. The SO primarily concentrates on the strategy, design, and continual service improvement phases of the life cycle, relying more heavily on the SOM during transition and operation, while remaining accountable for the delivery of the service to meet agreed-upon service levels.
Strategy

SOs provide strategic leadership with respect to their service and its ecosystem. In order to do this effectively, they must understand the needs of the community related to their service, ideally ensuring that those needs are documented and agreed on with community representatives. They should also understand how others are providing similar services in their own communities, particularly in the case of service offerings where people have the option of using free or extremely inexpensive alternatives. The use of benchmarking, industry analysis, and peer networks can be important here.

The SO is responsible for periodic review of the service roadmap, including existing and projected service offerings, as well as technology and industry trends. This evaluation ensures strategic alignment of assets with desired outcomes. As part of this process, attention should be paid to critical success factors, appropriate resource allocation, prioritization, and IT organization and institutional strategic plans.

If a new service offering has been identified as a candidate for delivery, the service owner should sponsor a strategic assessment of both internal and external aspects of the service. These include competitive service offerings, resource availability, risk and cost considerations, and strength of the business case. Common questions about the service offering being considered may be:

- What value will it provide?
- To what part of the community will it provide that value?
- Does the service offering replace or augment any other offerings?
- How will we deal with external competition?

As part of instantiating a new service offering, the SO should ensure that it is clearly defined, that the parent service definition is updated as needed to accommodate the new offering, and that community representatives for whoever will be using the offering are identified and engaged.

The SO should determine when significant changes are needed to the service or its offerings and should assess when the service or its offerings are ready for retirement. Legacy service offerings that continue on indefinitely can be a substantial cost strain for many higher education institutions, and the SO, by exposing the cost and risk of such offerings, can be of great service to the institution.
SOs are accountable for the effective budgeting, billing, and rate-setting activities for their service, even when the budget is not directly under their control. In cooperation with the institution’s administration, higher education IT organizations may often choose to operate services at a loss and/or at no cost to the community because the benefit to the organization of doing so outweighs the expense. Understanding what it costs to provide the service is always useful information however, even when there is no billing.

The SO works with the SOM to identify how service offerings interact and depend on each other in order to make strategically sound decisions. This includes risk assessment and may require an understanding of the inner workings of each service offering.

**Design**

The SO has ultimate accountability for design of the service and related offerings. The SO establishes service level targets, ensuring that the resulting design supports delivery of the agreed-upon targets (e.g., availability, capacity, security). This encompasses the technical solution, including monitoring and event management, even if the solution is cloud based. The SO is also accountable for the people and process sides of design. This includes planning and securing the resources needed for service operation, development of incident and request models that are in line with the organization’s service management processes, and publication of the service and related offerings in the service catalog. Where applicable, the owner is also accountable for ensuring a disaster recovery response and business continuity procedures.

The SO also develops metrics that aid in management of the service, providing key inputs into service improvement initiatives. As with other stages in the life cycle, the SO might not personally undertake all of these activities but is ultimately accountable for them.

**Transition**

The SO is responsible for overseeing transition of services and service offerings. This includes ensuring that appropriate resources are available and assigned to service offering transition efforts. Service owners are also responsible for understanding obstacles to successful deployment of the service or service offering and identifying ways to overcome those obstacles. Lastly, SOs ensure that
stakeholders, including leadership, have the information they need about the service and service transition efforts.

**Operation**

The SO is generally not involved in day-to-day operational activities but remains accountable for continued management of the service, including adherence to financial models and budgets and ensuring staff have the necessary skills and resources to support the service. The SO is accountable for the confidentiality, integrity, and availability of all service assets, information, and data and identifies and manages all risks associated with the service. The SO maintains regular communication with all SOMs to monitor service health, evaluate service metrics and performance criteria, and provide feedback on the performance of the SOMs.

**Continual Service Improvement**

Because SOs are ultimately accountable for the life cycle and value of each service offering, they must see that the offerings are appropriately managed, maintained, and improved. In this way, the SO can ensure that partner needs are met and that resources used in support of the service provide the greatest return on investment for the organization. This includes regular service reviews, advocating and providing resources for service improvements, and ultimately determining when a service retirement is appropriate.

**SOM Activities**

The SOM is focused largely on tactical and operational responsibilities for service offerings, supporting the service owner during the strategy and design stages of a service. For new services, the SOM role may not have been filled during the strategy stage but should be assigned and filled during the design stage. This section assumes that the role has been filled.

**Strategy**

Within the strategy life-cycle phase, the SOM role is largely supportive of the service owner. The SOM provides data about the service offering, including customer satisfaction and quality metrics. Usage statistics, feature requests, and incident resolution are examples of metrics that are reported to the SO. The quality of the service offering is assessed, and needs for resources, improvement, and/or retirement of the service are also evaluated.
Design

The SOM’s focus during this phase is largely tactical and includes working with the service owner to develop a business model (within the broader service) and service catalog listing(s) for the offering. SOMs are responsible for development of materials necessary for end users and front-line support teams to consume and support the service offering, including service requests, knowledge articles, and related information. When the service depends on teams that are outside the service owner’s sphere of influence, SOMs might take some responsibility in developing underpinning contracts and operating level agreements (OLAs), though the SO is ultimately accountable.

Transition

The SOM supports the SO during the transition of a service offering. This includes promoting the service to partners and stakeholders, communicating with supporting and supported service teams, and keeping the SO up to date on transition activities. In addition, the SOM manages changes to the service offering catalog entry and ensures that appropriate training, onboarding, and documentation are available for users and support teams.

Operation

The SOM is accountable for all daily operations of the service offering, including monitoring and analyzing metrics to evaluate the performance of the service offering and coordinating with internal providers and performing vendor management to ensure that service delivery meets business objectives. Also critical to the success of the service is participation by the SOM in change management, service continuity, availability and capacity, configuration management, release management, problem management, and incident management related to the service offering. This extends to monitoring end-user experiences, working with support teams to ensure that the offering meets the support needs of the end users. The SOM remains in communication with the SO to ensure that the service offering adheres to the financial and budgetary requirements and provides feedback regarding resources and performance.

Continual Service Improvement

Over the life cycle of a service offering, both users’ needs and the offering itself are likely to change. A successful SOM will maintain a continual service improvement
register: a list of opportunities, challenges, feature requests, unmet needs, and other enhancements. These may come from direct user feedback, stakeholder focus groups, service desk incidents, or other sources. By maintaining a relationship with vendors and project teams, the SOM will have an opportunity to advocate for these improvements, enhance the user experience, and extend the useful life of the service offering.

**Potential Challenges**

As with any initiative, there are risks and challenges to successfully defining and implementing service owner and service offering manager roles in your IT organization. Common risk areas include structure and culture, resources, and tools.

**Structure and Culture**

IT organizations that are IT-asset focused, rather than service focused, may find it challenging to identify and empower SOs and SOMs. Fundamentally, service ownership starts with a single point of accountability for the delivery of a service at agreed-upon levels (SLAs). A service focus requires an IT organization that is able to make, monitor, and deliver internal commitments between collaborating services areas. Lack of commitment to develop, monitor, and enforce OLAs, reflecting the need for accountability across the IT organization, is an indicator that SOs and SOMs might run into barriers coordinating service strategy, design, delivery, and transition across the organization.

Cultural challenges, such as lack of governance that effectively links IT organization planning, prioritization, and resourcing with the institution’s goals and priorities, will leave SOs and SOMs without necessary guidance and access to resources with which to successfully plan and oversee service delivery.

Highly siloed IT organizations (horizontally or vertically) will likely present communication and territorial barriers to effective implementation of the SO and SOM roles. Similarly, SOs who are not also responsible for service offering delivery in these organizations may encounter territorial or political barriers to engaging strategically with stakeholders.

Finally, in IT organizations that lack a basic level of understanding or commitment to ITSM principles, especially service life-cycle management, SOs
and SOMs will likely be frustrated and unable to realize benefits of these definitions and recommendations.

**Resources and Tools**

When developing and implementing formal roles and responsibilities for SOs and SOMs, care should be taken to plan for the additional workload and investment in ITSM skills. However, using the role definitions laid out in this paper may result in resource efficiencies through reduction in the duplication of activities.

IT organizations lacking mature ITSM tools, such as organizations dependent on spreadsheets for their service catalog, may find it difficult to empower and engage SOs and SOMs in an effective manner. Several challenges are specifically related to the service catalog:

- **A service catalog either doesn’t exist or is out of date:** While the IT service catalog is a fundamental ITSM tool, the lack of a service catalog points to a deeper challenge to the organization’s ability to identify and fulfill the needs of the organization. Organizations lacking an accurate and useful service catalog may benefit from developing and assigning at least the SO role in order to create a cohort to guide service catalog strategy and improvement.

- **The service catalog is not structured to represent a hierarchy of services and service offerings:** Organizations that structure their service catalog differently should still be able to apply the roles, responsibilities, and tasks recommended in this paper to their structure, but they may need to modify and/or change the distribution of responsibilities and tasks.

- **The service catalog focuses on assets and tasks:** When the service catalog focuses on products and the tasks that IT staff deliver and perform, the phases of service life-cycle management cannot easily be mapped to the service catalog, making it difficult to build appropriate service portfolios for SOs and SOMs. Again, the concepts of service ownership may be leveraged to improve the service catalog.

The lack of effective and integrated tools supporting ITSM processes, such as service portfolio, incident, request, problem, configuration, and change management, may leave SOs and SOMs unable to effectively fulfill their roles. As with any major initiative, organizations may find it preferable to take an iterative or phased approach to implementing these practices.
What’s Next? Suggested Action Plan

As leadership begins to define and apply the service owner and service offering manager roles for the organization, ITSM managers can apply these suggested actions and practices to aid the process. Keep in mind that the concepts and suggestions offered are merely a starting point and that the path to implementation can be as unique as the institution.

The implementation of the roles can be a significant change in process for teams, so it is recommended that ITSM leaders begin small with implementation and take a phased approach. One possible method could be to begin with one team or unit that would be willing to pilot the process for the institution and then become champions for further implementation.

Many colleges and universities have found it advantageous to implement the concepts of service ownership while they are implementing other service planning activities or projects. For example, if ITSM leaders are implementing or refreshing a service catalog, that may be an optimal time to introduce service owners and define their responsibilities at the institution. Alternatively, the institution might undertake a service portfolio review, and one task in that project could be to identify the SOs and SOMs across the portfolio as it is reviewed.

Even if ITSM leaders have the roles already in place at your institution, there are some steps that can be taken to increase adoption and build campus community around these concepts. Managers can share this information with their teams and facilitate discussions of how the concepts could be better applied. ITSM leaders could also host an ITSM affinity group to address pain points in implementation and ask participants to read this material as well as the EDUCAUSE working group paper *Demonstrating Value Through IT Service Management in Higher Education*.

You may need to adapt these principles to your unique campus culture. For example, smaller institutions may have one person serving in multiple roles, or your institution may have the role identified but use a different label for it (e.g., “service lead”). Flexibility in your implementation can be helpful to adoption, which is the goal for adding value to your services.

The roles and responsibilities of SOs and SOMs in higher education are often misunderstood. It is our hope with this paper to provide a framework and guidance for defining, implementing, and benefiting from these roles at your institution and within the ITSM service life cycle. Although well established as a
service framework, the application of ITSM in higher education is still maturing, and these recommendations may evolve over time. We welcome further conversation and development of these recommendations through engagement in the EDUCAUSE ITSM Constituent Group.

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Notes

1. Visit the Axelos site for more about ITIL best practices.

2. These roles are supportive of the service catalog model described in the ECAR paper, *The Higher Education IT Service Catalog: A Working Model for Comparison and Collaboration* (Adizes et al., April 8, 2015). In this model, IT services are organized into major categories, such as “Administrative and Business,” “Infrastructure,” “Teaching & Learning,” etc. Each IT service represents a set of common functionalities, such as “email” or “CRM.” Each IT service consists of one or more service offerings, such as Gmail and Office365 under the email service.

3. In the context of higher education, some industry-standard terms such as “customer” or “user” may not appropriately describe the relationships we have with our stakeholders. For the purposes of this paper, we have chosen to use “partner.” Similarly, the term “business” in this context should be construed to include academic, enterprise, and other operational needs of an institution.

4. A related term that has gained popularity in recent years is that of product manager. However, while there may be some overlap, this term is not consistently defined or applied within higher education and will require further development.

5. As described in the EDUCAUSE IT service catalog taxonomy and structure (see *The Higher Education IT Service Catalog: A Working Model for Comparison and Collaboration*).

6. Ibid.

About EDUCAUSE

EDUCAUSE is a higher education technology association and the largest community of IT leaders and professionals committed to advancing higher education. Technology, IT roles and responsibilities, and higher education are dynamically changing. Formed in 1998, EDUCAUSE supports those who lead, manage, and use information technology to anticipate and adapt to these changes, advancing strategic IT decision making at every level within higher education. EDUCAUSE is a global nonprofit organization whose members include U.S. and international higher education institutions, corporations, not-for-profit organizations, and K–12 institutions. With a community of more than 99,000 individuals at member organizations located around the world, EDUCAUSE encourages diversity in perspective, opinion, and representation. For more information please visit [educause.edu](http://educause.edu).

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