IT Strategic Planning Project

FY2004
Information technology is
... a **strategic resource** in higher education
... a **driving force** in enabling change.
... continues to **transform** teaching, learning, scholarship, research, business and administrative practices, and our relationships with students, alumni, and other constituents

**EDUCAUSE 2002**
Why Strategic Plan?

If you don't know where you're going...any road will get you there...
How do you make decisions without a plan?
March 2002: Benchmarking Study for MCIS
April 2002: Collegis Eduprise Assessment
August 2002: Comparison Report between Benchmarking and Assessment
Spring 2003: Reid Christenberry hired as Vice President for IT
Project Objectives & Deliverables

- Develop an IT strategic plan
- Develop an ongoing strategic planning process for IT
- Integrate with and support the overall Miami University vision and mission
- Set the stage for effectively managing the portfolio of technology projects and programs at Miami
Elements of A Successful IT Strategic Planning Process

1. A Project Management Methodology
   - Scope document
   - Critical issues identification
   - Project team(s)
   - Roles and responsibilities
   - Project plan
   - Communication plan

2. Collaboration and total institutional involvement

3. A thorough environmental analysis

4. A process for continually examining IT opportunities for improvements in instruction, administration, and services

5. Means of prioritization of information and instructional strategies
## Components of an IT Strategic Plan

<table>
<thead>
<tr>
<th>Vision and Mission</th>
<th>Who We Are and What We Do</th>
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<tbody>
<tr>
<td>Strategic Goals</td>
<td>What We’re Trying to Accomplish in the Long Term</td>
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<tr>
<td>Strategic Objectives</td>
<td>What We’re Trying to Accomplish in the Short Term</td>
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<tr>
<td>Tactics</td>
<td>What and How</td>
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<td>3-5 Years</td>
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<td>12-18 Months</td>
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<td>Now-12 Months</td>
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IT Strategic Planning
A Continuous Process

1. Conduct Environmenta Analysis
2. Develop, Revise, & Align Plan
3. Integrate, Develop Tactics & Measures
4. Implement, Monitor, Evaluate, & Adjust
Step 1: Environmental Analysis

- **External Environmental Analysis**
  - IT Advisory Committee
  - Benchmarking Schools
  - Higher-education Resources

- **Internal Environmental Analysis -- SWOT**
  - Inventory IT Resources
  - Previous Studies & Assessments
  - Interviews
  - Focus Groups with Campus Constituents
Step 2: Develop Strategic Plan

- Core Team Retreat
  - Vision
  - Mission
  - Guiding Principles
  - Strategic Goals
  - Strategic Objectives
- Write Draft Plan
- Present and Receive Feedback
- Prepare Final Draft
Step 3: Develop Tactics & Measures

- Integrate Planning Efforts
- Charter Cross-functional Teams
- Develop First Draft Tactics & Measures
- Review
- Revise
- Implement
Step 4: Implement & Adjust

- Implement Tactical Plans
- Monitor on a Regular Basis
- Evaluate Based on Criteria & Prioritization
- Adjust
- Continue Implementation
- Annual Review of Vision & Strategy
# Project Timeline

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Start</th>
<th>Finish</th>
<th>Q3 03</th>
<th>Q4 03</th>
<th>Q1 04</th>
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<td>Feb</td>
<td>Mar</td>
<td>Apr</td>
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<td>2</td>
<td>Environmental Analysis</td>
<td>8/1/2003</td>
<td>12/2/2003</td>
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<td>Stakeholder Input</td>
<td>9/12/2003</td>
<td>12/2/2003</td>
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<td>IT Strategic Plan Development</td>
<td>12/3/2003</td>
<td>2/13/2004</td>
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<td>Tactical Plan Development</td>
<td>2/16/2004</td>
<td>4/30/2004</td>
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Project Organization

- Project Sponsor
  - Project Leader
  - Steering Team
    - Core Team
    - Constituency Representation
Project Sponsor

1. Champions the project
2. Provides the resources, direction, and support needed to implement the project
3. Provides input and make decisions as needed.
4. Communicates support for the project to external and internal stakeholders
Project Leader

1. Leads the project and the Core Team in meeting the project goals
2. Serves as the key contact and spokesperson for the project
3. Facilitates decision-making to ensure progress is being made on all tasks
4. Approves and manages the project budget
5. Facilitates the Core Team in developing and executing a communication plan
6. Escalates critical issues to the Project Sponsor

Project Leader
J. Reid Christenberry
Vice President for IT
1. Provides overall project direction
2. Removes barriers and obstacles
3. Sets boundaries and resolve policy issues and disputes
4. Monitors progress of the project
5. Communicates support for the project to external and internal stakeholders
Core Team

1. Ultimately responsible for the success of this project
2. Communicates and coordinates with stakeholders
3. Oversees the progress of the various project tasks
4. Makes day-to-day project decisions
5. Escalates issues to the steering team, as needed
6. Anticipates and solves problems as they affect the project
7. Ensures that the project communication/involvement plan is in place and is being executed
8. Supervises project vendors

Core Team
Stephen Wright, Stan Brown, Tecumseh Bryson, Ethan Karpe, Michael Mills, Bill Knisely, Debi Allison, Carolyn Haynes, Mark McBride, Judith Sessions, Daniel Hall, Luis Actis

Resources:
Cornelius & Associates, Beth Farthing Moore
Constituency Representation

1. Provides functional input into the project and plan
2. Participates in focus group sessions
3. Reviews documentation from sessions and provide input
4. Reviews IT Strategic Plan and gains and provides input