ITS Strategic Planning Process
Educause Webinar

Information Technology Services
July 18, 2019
Agenda

• Welcome!
• Background
• Strategic Plan Components
• Approach
• Timeline
• Tools
  – Initiative Scoring Matrix
  – Quadrant Heat Map
  – Wrike
  – Office Timeline+ (PowerPoint add-in)
• Remaining Relevant
• Where Are We Now?
• Conclusion
Background

• Why A Strategic Plan?
  – Ensure our efforts are enabling University and customer priorities
  – Ensure we have a repeatable process to assess new initiative requests, and keep our plan up to date with changes in priorities, environmental factors, and other variables
  – Create a roadmap to visualize where we’ve been and where we’re going
  – Have a mechanism to measure progress and success of strategic initiatives
Strategic Plan Components

• Executive Summary
• Mission
• ITS Values
• Strategic Themes
  – Student Experience
  – Teaching and Learning
  – Analytics / Big Data
  – Common Platforms
  – Foundational Strategies
• Priorities and Initiatives
Plan Development Approach

**Fairfield 2020 Strategy**

- Started high level and progressively narrowed focus to build a *draft* Roadmap of initiatives and projects for the next 5 years.
- Gartner and The Tambellini Group reviewed plan for gaps or opportunities, and validation of alignment with business and technology trends in Higher Ed.
- 1st quarter of 2019: conduct visioning sessions with campus partners. Update draft based on sessions.

**ITS VALUES**
Enabling successful plan delivery

**Why A Strategic Plan?**
*Enable University, customer and stakeholder strategic priorities*
*Ensure ITS operates strategically and proactively, as a partner and with a customer service lens*

**Input Sources:**
- Fairfield 2020
- Campus Partners
- Gartner
- EDUCAUSE
- Horizon Report
- National Education Technology Plan
- Other University IT Strategic Plans
Timeline

Oct 15 - Nov 2  Define Approach (Brigitte; reviewed with CIO)
Oct 22 - Nov 2  Identify Plan Components (Brigitte; reviewed with CIO)
Nov 5 - Nov 30  ITS Leadership Workshops
Nov 5 - Dec 21  Develop First Draft
Jan 1 - Jan 31  Identify and Engage Customer Champions
Feb 1 - Apr 19  Conduct Customer Focus Group Sessions
Feb 4 - Apr 30  Update Draft Based on Customer Input
Pause for questions
## Tools

### Initiative Scoring Matrix

- Rough Order of Magnitude
- Relative comparison of initiatives
- Alignment to University priorities

<table>
<thead>
<tr>
<th>Strategic Theme</th>
<th>Initiative Summary</th>
<th>Effort</th>
<th>Value</th>
<th>Cost - Bubble Size</th>
<th>People (e.g.: think of capacity, # of people needed, skills, competency)</th>
<th>Process (think of whether or not we’re able to adapt current processes, vs. needing an overhaul)</th>
<th>Technology (e.g.: easy to implement platforms, limited or simple integrations, etc.)</th>
<th>Effort Score</th>
<th>Value Score</th>
<th>Contributes to University Priorities</th>
<th>Scope of Impact (e.g.: one department benefits, or entire University benefits)</th>
<th>Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Experience</td>
<td>Modernize SIS</td>
<td>30</td>
<td>20</td>
<td>1: &lt; $100K</td>
<td>10</td>
<td>10</td>
<td>5</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>20</td>
<td>20</td>
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<tr>
<td>Student Experience</td>
<td>Residence of the Future</td>
<td>15</td>
<td>15</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>10</td>
<td>20</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>15</td>
</tr>
<tr>
<td>Student Experience</td>
<td>Tech Solutions to Enhance Student Exp</td>
<td>20</td>
<td>15</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>10</td>
<td>20</td>
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<td>15</td>
</tr>
<tr>
<td>Student Experience</td>
<td>Tech Accessibility</td>
<td>3</td>
<td>6</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>6</td>
</tr>
</tbody>
</table>

Effort (1 = Low; 5 = Medium; 10 = High) - X Axis
Value (1 = Low; 5 = Medium; 10 = High) - Y Axis
Tools

Quadrant Heat Map – developed based on Initiative Scoring Matrix

Created using Bubble Chart Pro
(www.bubblechartpro.com)
$49.97
Tools

Student Experience Theme-Specific Quadrant Heat Map
Strategic Plan Example

• Unified Communications:
  – This didn’t surface in industry research, and didn’t tie directly to a university strategic priority
  – The effort scored in the “Reconsider” quadrant
  – During annual capital budgeting process, risk of not pursuing the initiative elevated the value
    • Current phone system is end of life
    • High IVR failure rates
    • Lacking functionality available in unified communication systems and desired by customers (e.g.: voicemail-to-text; ability to access telecommunication capability from any device, including laptops, iPads and smartphones)
Pause for questions
Tools

From Strategy to Execution

• Deployed Wrike as our cloud-based project and portfolio management tool
• Created our Roadmap structure in Wrike
  – ITS Portfolio
    • Strategic Themes
      – Initiatives
• Tracking initiative progress, status, strategic alignment in Wrike
• Ability to create dashboards within Wrike or via export to external tools
Tools – Wrike Analytics
Tools – Office Timeline+

- Initiative 1: 50% from Feb 15 to Oct 1
- Initiative 2: 10% from Mar 1 to Jun 30, 20% from Mar 1 to Dec 20
- Initiative 3: 50% from Apr 1 to Dec 20
- Initiative 4: 5% from Apr 1 to Jun 30
- Initiative 5: 100% from Apr 1 to Jun 30
- Initiative 6: 100% from Apr 1 to Jun 30
- Initiative 7: 50% from Jun 1 to May 31
- Initiative 8: 10% from Jul 1 to Jun 30
- Initiative 9: 20% from Jan 1 to Jun 30
- Initiative 10: 5% from Jan 3 to Jun 30

Data Exported from Wrike into Office Timeline+ (PowerPoint add-in) (www.officetimeline.com) “Plus” edition $59/year
Where Are We Now?

• We have a solid, customer-reviewed first draft.
• The University is updating Fairfield 2020; once updated, we’ll review our plan for alignment and then publish it – make it official!
• In the meantime, there are critical activities that are needed, regardless of the replan.
Remaining Relevant

• The plan is not a static document

• Update process:
  – Annual: formal review, starting with ITS leadership, approximately 3 months prior to the budget cycle
  – Ad hoc reviews, driven by:
    • New initiatives (resulting in portfolio impact assessments)
    • Key events, such as strategic university activity – e.g.: launching a new graduate program directive
    • Significant trend change
Conclusion

Minimize constraints; dream big!
Conclusion

Have fun!
Conclusion

Thank you for your time!

If you would like to discuss any topics further, feel free to contact me (Brigitte Rouleau) at brouleau@Fairfield.edu.