

Information Technology Strategic Planning Scope Document

August 12, 2003

Project Sponsor:

Dr. Jim Garland
President

Project Leader:

J. Reid Christenberry
Vice President for Information Technology

Objective:

Develop a strategic plan and ongoing strategic planning process for information technology at Miami University. This strategic plan and process will integrate with and support the overall University vision and mission.

The project will follow a four-phase strategic planning approach, fast tracking where possible, that includes 1) an environmental analysis; 2) development of the strategic plan; 3) development of tactics and measures; and 4) implementation, monitoring, evaluation and adjusting.

The strategic plan will set the stage for effectively and efficiently managing the portfolio of technology projects and programs on the Miami University campus.

The target time frame for the first two phases of the project will be July 2003 through January 2004. The development of tactics and measures will follow and should begin in February 2004 and be completed at the end of March 2004.

Background/Narrative:

President Jim Garland stated the following in his First in 2009 Strategic Vision for Miami University:

By its two-hundredth birthday, Miami University will be the leader in the nation among public universities having a primary emphasis on undergraduate education and also having significant graduate and research programs.

Background/Narrative Continued:

“Information technology is now well understood as a strategic resource in higher education, a driving force in enabling change. Information technology continues to transform teaching, learning, scholarship, research, business and administrative practices, and our relationships with students, alumni, and many other constituents”. – EDUCAUSE 2002.

Clearly, technology will play an important and strategic role in fulfilling the President’s vision. The challenge for information technology at Miami University is to develop and implement new and creative approaches to sustain academic programs and support operations. State of the art IT infrastructure is critical as well as the ability to support and facilitate a diverse and progressive campus in meeting their objectives in support of the First in 2009 vision.

During spring 2002, several activities set the stage for developing and implementing a strategic plan for information technology. In March 2002, a Benchmarking Steering Committee was chartered to implement a benchmarking project for Miami Computing & Information Services (MCIS) as part of the First in 2009 initiatives. In April 2002, Collegis Eduprise completed an assessment and provided a report on information technologies and learning technologies at Miami University. In August 2002, Bill Knisely and the MCIS management team provided a comparison report between the Collegis report and benchmarking recommendations. In each of these studies, the need for an articulated IT vision and strategy was highlighted.

In spring 2003, a CIO, J. Reid Christenberry, was hired to report to the president of the university. He was asked to set clear direction for IT at Miami University.

Deliverables:

1. An IT Strategic Plan for Miami University that would include:
 - a. An introduction and executive summary
 - b. A background summary report
 - c. An environmental analysis overview with supporting documentation
 - d. A strategic vision for Information Technology at Miami University
 - e. Missions for the various technology functions at the university
 - f. Overall IT guiding principles
 - g. Strategic goals or initiatives with related objectives
 - h. Overall and specific recommendations
 - i. Outline of the recommended ongoing planning process
 - j. Implementation timeline for first cycle of tactical plan development



Deliverables Continued:

2. An ongoing strategic planning process that
 - a. Includes four iterative phases
 - (1) Environmental analysis
 - (2) Development, revision and alignment of planning document
 - (3) Integration, planning and development of tactics and measures
 - (4) Implementation, monitoring, evaluating, and adjusting.
 - b. Identifies and involves all critical stakeholders
 - c. Coordinates and coincides with the University budgeting processes and cycle
 - d. Aligns with and directly supports "First in 2009"
 - e. Uses a project management methodology including:
 - (1) Developing a scope document
 - (2) Chartering a steering team
 - (3) Chartering a project team
 - (4) Creating a high-level project plan/timeline
 - (5) Conducting critical issue session(s)
 - (6) Developing and monitoring a dependency-driven project plan
 - (7) Developing and implementing a project communication plan

Boundaries:

1. The information technology strategic plan will include all technology functions within the Miami University.
2. Cornelius & Associates will provide the majority of the coordination, meeting facilitation, and interviewing throughout the process.
3. Cornelius & Associates will write and edit the strategic planning document and communications.
4. Project will use previous assessments and benchmarking studies as the base for developing the strategic plan.
5. The IT Strategic Plan must be aligned with and support "First in 2009."
6. An IT Strategic Planning Steering Committee must be available for monthly meetings.
7. An IT Strategic Planning Core Project Team must be available for monthly meetings, a 2-day planning retreat, and a 1-day tactical planning retreat.



Project Initiation

- Gain executive support
- Charter Steering Committee
- Charter Core Team
- Create Stakeholder Analysis
- Develop Project plan
- Develop Project Communications Plan

Environmental Analysis

- Conduct external environmental analysis
 - IT Community Advisory Council
 - Higher-education resources
 - Benchmarking schools
 - IT strategic planning outside higher education
- Conduct internal environmental analysis
 - Inventory IT software, hardware, human resources
 - Current IT-related governance structures/other committees
 - Accomplishments to date
 - Existing assessments & reports
 - Interviews
 - Additional identified resources
- SWOT Analysis
- Key Issue Identification

Complete Analysis

- Meetings with stakeholders unavailable during summer
- Set up and implement meetings and focus groups sessions to review SWOT and Key Issues
- Document input

Develop Plan

- Continue input meetings
- Document results
- Hold IT Strategic Planning Core Team Retreat
 - Vision/Mission
 - Guiding Principles
 - Strategic Goals
 - Strategic Objectives

Develop Plan

- Develop first draft of strategic plan
- Hold critical stakeholders meetings for input
- Document input
- Prepare revised draft of strategic plan

Integrate, Develop Tactics

- Present IT Strategic Plan to Steering Committee for Approval
- Charter Cross-functional teams to develop FY05 Tactical Action Plans
- Facilitate cross-functional team meetings
- Document team meeting results
- Hold IT Strategic Planning Core Project Team Retreat

Develop Tactics

- Write first draft of FY05 tactical plan
- Circulate for input with key stakeholders
- Revise plan based on input
- Hold IT Strategic Planning Steering Committee meeting for final review

Begin Implementation

- Implement tactical plan



Preliminary Project Timeline

August – September 2003

Initiate Project

1. Gain executive support and sponsorship from the University President
2. Charter IT Strategic Planning Steering Team
3. Charter IT Strategic Planning Core Team
4. Develop high-level timeframe
5. Gain support from the Presidents Executive Council
6. Hold critical issues session(s)
7. Develop critical stakeholder analysis
8. Develop Microsoft Project Plan
9. Create Project Website
10. Develop project communications plan

Conduct Environmental Analysis

1. Conduct external environmental analysis
 - (a) Explore opportunities for an Information Technology community advisory council
 - i) Identify possible members*
 - ii) Shop concept with the President's Executive Council*
 - iii) Hold focus group session for input on IT strategic planning*
 - (b) Review EDUCAUSE 2002/2003 and other higher-education industry reports
 - (c) Review strategic planning efforts of the specific schools from the benchmarking study
 - i) William & Mary*
 - ii) Virginia Tech*
 - iii) Kent State*
 - iv) Wright State University*
 - v) UNC at Chapel Hill*
 - (d) Explore additional higher education IT strategic planning processes and results
 - (e) Review industry-leading strategic planning processes outside of the higher education market for best practice identification
2. Conduct internal environmental analysis
 - (a) Explore options for written or electronic means of gathering input
 - (b) Develop comprehensive inventory of IT hardware, software, and human resources
 - (c) Document current IT-related governance structures, related committees and councils, and existing policies, procedures, and processes
 - (d) Identify accomplishments related to recommendations made in Collegis/Eduprise and Benchmarking project reports

- (e) Review existing MCIS and information technology assessment documentation
 - i) *March 2002 Benchmarking Report*
 - ii) *April 2002 Collegis Eduprise "Information Technology and Learning Technologies Assessment Report"*
 - iii) *August 2002 Comparison Between Eduprise and MCIS Benchmarking Recommendations*
 - (f) Conduct interviews with technology areas (management and staff) across the institution to:
 - i) *Identify other studies or planning efforts*
 - ii) *Explore SWOT and key issue identification*
 - (g) Review additional identified resources
3. Based on the environmental analysis, develop a comprehensive SWOT Analysis and Key Issue Identification document for review with key stakeholders.
 4. Hold IT Strategic Planning Steering Committee to review progress and results.

September 2003

1. Implement one-on-one meetings of staff, students, and administrative or other staff unavailable during the summer months
2. Using the critical stakeholder analysis and project organization, develop a schedule for IT SWOT Analysis and Key Issue meetings and focus group sessions
3. Implement and document results from the IT SWOT Analysis and Key Issue Identification review sessions
4. Hold IT Strategic Planning Core Project Team Meeting
5. Schedule IT Strategic Planning Core Project Team Planning Retreat for late October/early November
6. Hold IT Strategic Planning Steering Committee to review progress and results

October 2003

1. Continue implementation of IT SWOT Analysis and Key Identification review sessions
2. Compile documentation from sessions
3. Develop prework and agenda for IT Strategic Planning Retreat
4. Hold IT Strategic Planning Core Project Team Planning Retreat to develop first drafts of: (2 Days)
 - a. IT Vision & Mission
 - b. Guiding Principles
 - c. Strategic Goals
 - d. Strategic Objectives

November 2003

1. Develop first draft of strategic plan
2. Hold critical stakeholder meetings for review of the draft plan
3. Document input

December 2003

1. Continue critical stakeholder meetings for review of the draft plan
2. Document input
3. Hold IT Strategic Planning Core Project Team Meeting
4. Hold IT Strategic Planning Steering Committee Meeting
5. Prepare revised draft of IT Strategic Plan based on input

January 2004

1. Present IT Strategic Plan to Steering Committee for approval and go ahead to develop first cycle of tactical plans
2. Charter cross-functional teams to develop tactical action plans for FY05

February 2004

1. Facilitate cross-functional team meetings
2. Document results from the team meetings
3. Hold IT Strategic Planning Core Project Team Retreat (1 day)

March 2004

1. Write first draft of tactical plan for FY05
2. Circulate tactical plan for review to key group of stakeholders
3. Revise tactical action plan based on input
4. Hold IT Strategic Planning Steering Committee meeting for final review of the tactical action plan for FY05