

IT Strategic Planning Project



**MIAMI
UNIVERSITY**

FY2004

Information Technology

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?



Project Background

- ◆ **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

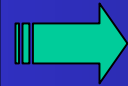
- ◆ Develop an IT strategic plan
- ◆ Develop an ongoing strategic planning process for IT
- ◆ Integrate with and support the overall Miami University vision and mission
- ◆ Set the stage for effectively managing the portfolio of technology projects and programs at Miami

Elements of A Successful IT Strategic Planning Process

1. A Project Management Methodology
2. Collaboration and total institutional involvement
 - Scope document
3. A thorough environmental analysis
 - Critical issues identification
 - Project team(s)
4. A process for continually examining IT opportunities for improvements in instruction, administration, and services
 - Roles and responsibilities
 - Project plan
 - Communication plan
5. Means of prioritization of information and instructional strategies

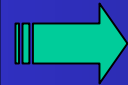
Components of an IT Strategic Plan

Vision and Mission



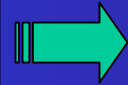
Who We Are and What We Do

Strategic Goals
3-5 Years



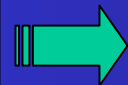
What We're Trying to Accomplish in the Long Term

Strategic Objectives
12-18 Months



What We're Trying to Accomplish in the Short Term

Tactics
Now-12 Months



What and How

IT Strategic Planning

A Continuous Process



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

ID	Task Name	Start	Finish	Q3 03		Q4 03			Q1 04				
				Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	
1	Project Initialization & Planning	8/1/2003	9/11/2003	█									
2	Environmental Analysis	8/1/2003	12/2/2003	█									
3	Stakeholder Input	9/12/2003	12/2/2003		█								
4	IT Strategic Plan Development	12/3/2003	2/13/2004				█						
5	Tactical Plan Development	2/16/2004	4/30/2004							█			

Project Organization

Project Sponsor

Project Leader

Steering Team

Core Team

Constituency Representation

Project Sponsor

Project Sponsor
Dr. Jim Garland
President

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

Project Leader
J. Reid Christenberry
Vice President for IT

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

Steering Team

Steering Team

Richard M. Norman,
Ronald A. Crutcher,
Richard L. Nault,
Jayne E. Irvin

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

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

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

Constituency Representation

Constituency Representation

Senate Committee (CISC)

TSR Advisory Group

Student Technology Advisory Group

Administrative Systems Users

Decision Support and Information Access

Institutional IT Staff

First in 2009 Topical Groups

Instructional Uses of Technology

Research and Advanced Computation

Council of Deans (COAD)

Library

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