

Miami University IT Strategic Plan

FY05: Mid Year Review

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Original Tactical Plan Status Update

Strategic Goal #1: Empower and Enhance Learning & Research

PROJECT	STATUS
PROJECT #1: Classroom/Open-access Computing Labs Project	Study to be completed in February 2005 with recommended model for managing classrooms and open-access labs.
PROJECT #2: Classroom/Open-access Computing Labs Improvement Implementation Project	Implementation of the study to be completed in February 2005.
PROJECT #3: Research Support Model Project	Model to be documented for input in February 2005. Focus groups help define the role of additional positions in Academic Technology Services in IT Services.
PROJECT #4: Research Support Improvement Project	Implementation of the model recommendation in February 2005.
PROJECT #5: On-line Course Management System Enhancement Project	Study to be completed in February 2005. Early technical recommendation completed with recommendation for full implementation of the three Blackboard components.
PROJECT #6: On-line Course Management Improvement Implementation Project	Implementation of the recommendation in the study project. Has begun so that all components of Blackboard will be in production by fall 2005.
PROJECT #7: Information Technology Literacy Project	No activity on this project to date.
PROJECT #8: Web-based Course Augmentation/eLearning	A grant through SFA(?) has moved this project forward.

Strategic Goal #2: Build and Expand Reliable, Robust, Secure Access to Information

PROJECT	STATUS
PROJECT #9: Third Frontier Network Migration Project Implementation	
PROJECT #10: Oxford Area Wireless Pilot	
PROJECT #11: Email and Calendaring Next Generation Architecture Study Project	
PROJECT #12: Storage & Server Pilot Project Implementation	
PROJECT #13: Network Architecture Strategy Implementation	
PROJECT #14: Network and Workstation Protection Strategy Study	To be complete by May 2005.
PROJECT #15: On-campus Wireless Deployment Strategy Development Project	Academic and administration buildings complete by June 2005. Luxembourg complete in August 2005.
PROJECT #16: Strategic and Tactical Security Project	
PROJECT #17: Enhance Disaster Recovery Capabilities Project	
PROJECT #18: Software Licensing and Management Study Project	

Strategic Goal #3: Promote Customer-centered IT Support and Services

PROJECT	STATUS
PROJECT #19: Establish IT Services Customer Advocacy Role	Ongoing.
PROJECT #20: Communications Model Project for IT Services Department	Ongoing.
PROJECT #21: Customer Service Support Model Development Project	Replaced with the implementation of many other projects and the introduction of the partnership program.
PROJECT #22: SCT Luminis & Documentum Content Management System (CMS) License Evaluation	Recommendation to implant the portal portion of Blackboard.
PROJECT #23: Portal Enhancement OR Luminis Implementation	Underway. Implementation to be completed by May 2005.

Strategic Goal #4: Ensure Continuous Innovation

PROJECT	STATUS
PROJECT #24: Innovation Support Model Study Project	Project originally planned for FY2006.

Strategic Goal #5: Support University Administration and Management

PROJECT	STATUS
PROJECT #25: Banner 6 Implementation Project	Complete.
PROJECT #26: Decision Support System Project & Pilot	Recommendation under review. Phase I/Pilot scheduled for late summer 2005.
PROJECT #27: Banner Lifecycle and Governance Project	Governance portion of the project included in the IT Policy, Planning & Governance project. Individual Banner operational projects were spun off for implementation including on-line purchasing, Internet Native Banner, and Banner self-service for employees.

Strategic Goal #6: Plan and Manage Information Technology

PROJECT	STATUS
PROJECT #28: Information Technology Policy and Governance Project	Project underway. Governance model to be ready for implementation in June 2005.
PROJECT #29: IT Planning Operationalization Project	Combined with Project #28.
PROJECT #30: IT Services/CIO Management System	Test pilot in June 2005.
PROJECT #31: IT Services Project Office Implementation	
PROJECT #32: Technology Funding Model Study Project	
PROJECT #33: Implement IT Services New Leadership Team	Leadership and teamwork activities completed along with performance management processes.
PROJECT #34: IT Services Performance Management Enhancement Project	Framework for Success (FFS), a comprehensive performance management system, has been implemented throughout IT Services
PROJECT #35: Continuous Infrastructure Improvement Process	

Prioritized Tactical Plan January – June 2005

Project	Goal #1	Goal #2	Goal #3	Goal #4	Goal #5	Goal #6
1. Blackboard Enhancement Implementation	X					
2. Research Support Model	X					
3. Classroom/Open Access Computing Labs Model Development	X					
4. Decision Support Project				X		
5. CIO Management System						X
6. E-Learning	X					
7. Remedy			X			
8. Internet Native Banner				X		
9. Online Purchasing				X		
10. Continuing Education Enhancements	X					
11. Computer Partnership Program			X			
12. On Campus Wireless (MuNet Wireless)		X				
13. NAMS		X				
14. SSL Encryption		X				
15. Mitigating Single Point of Failure		X				
16. Primary Disaster Recovery		X				
17. Virtual Servers and Storage		X				
18. Finish Deployment of ACD		X				
19. Continued Network Enhancements		X				
20. Computing Environment Services		X				
21. Workstation Protection Implementation		X				
22. Project Management Intake						X
23. IT Policy, Planning & Governance						X
24. University Web Presence Coordinator			X			
25. Technology Funding Model						X
26. Space Planning						X
27. Blackboard Enhancement Study	X					
28. Web Self-Service for Employees				X		
29. Banner Lifecycle & Governance				X		
30. Establish ISS Standards		X				
31. Informed Decisions – Cashiering & C.C.				X		
32. University-wide Security Awareness		X				
33. Network Security Enhancements		X				

34. Strategic & Tactical Security Projects		X			
35. IT Services Communications Model			X		
36. Enhanced Telephony		X			
37. Oxford Area Wireless		X			
38. Third Frontier Network		X			
39. Core Network Upgrade		X			
40. Email & Calendaring Next Generation Study		X	X		
41. Server Consolidation Study		X			

Fall 2004 External Environmental Analysis Summary

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Introduction

As part of our effort to refresh Miami University's IT Strategic Plan each year, we conducted an external environmental analysis during the Fall of 2004.

The following resources were used during the environmental analysis to gauge where there have been significant changes since the IT Strategic Plan was published in May 2004.:

1. Attendance by IT Services Leadership Team members at both the annual Gartner and EDUCAUSE conferences.
2. Gartner Group's research on IT issues in higher education and overall.
3. EDUCAUSE and ECAR surveys and research
4. The 2004 Campus Computing Survey and analysis

Three noteworthy items are mentioned below.

- We examined the top ten issues higher education CIOs reported as needing to be resolved for the institution's strategic success, and mapped those issues to the university's IT tactical projects. The most notable change when comparing the top ten lists from 2003 to 2004 is that IT Strategic Planning has significantly advanced in the eyes of the CIOs in terms of being crucial for success.
- A change we noted in the 2004 Campus Computing Survey is the increased attention universities are giving to respond to the concerns of media industry officials and Congress regarding copyright violations of digital commercial content. We have discovered that around 20 universities have implemented legal music sharing services for their students. We are currently investigating these programs and are surveying students to learn of their interest.
- We also learned from an EDUCAUSE ECAR study that surveyed 483 EDUCAUSE institutions that institutions reporting effective IT governance, IT planning, communication, measurement and assessment also reported IT alignment (define IT alignment). At institutions with a clear vision and priorities, 91% perceive that IT is aligned with the needs of the institution. We continue to work on initiatives to improve communications, develop a continuous strategic planning process, and make improvements to the involvement of students, faculty and staff in IT decision-making.

Should you have comments on this document or the IT Strategic Plan and associated materials on the web site at www.muohio.edu/itplan, please contact J. Reid Christenberry (chrisjr@muohio.edu, 529-8338) or Debi Allison (allisodh@muohio.edu, 529-5327).

EDUCAUSE Top Ten IT Issues (571 institutions responding)

For the last five years, EDUCAUSE has conducted its Current Issues Survey to identify what campus information technology leaders see as their most critical IT challenges.

Three overall findings for all respondents to this year's survey are especially notable.

1. For the second year in a row, funding IT remains the number one IT-related issue in terms of strategic importance.
2. Not only does security and identity management remain among the top-ten issues on all four measurements (strategic importance, growing in significance, demanding the campus IT leader's time, and expenditure of human and fiscal resources), but it has risen dramatically in resource consumption – from 8th in 2003 to 3rd in 2004.
3. Two new issues have made the top-ten list of strategic related issues: a) business continuity/disaster recovery, and b) governance, organization and IT leadership.

Following are the top 10 issues identified by 571 IT leaders that need to be resolved for strategic success.

2004	2003	Issue	Our projects
1	1	Funding IT	IT Strategic Planning; Technology Funding Model
2	2	Administrative/ERP/Information Systems	Banner System Enhancement & Support; Decision Support
3	3	Security & Identify Management	Strategic & Tactical Security
4	6	Strategic Planning for IT	Continuous IT Planning
5	5	Faculty Development, Support, and Training	Classroom/Open Access Computing Labs; Research Support Model; Online Course Management System Enhancement; Innovation Support Model; IT Literacy
6	-	Infrastructure Management for IT	Continuous Infrastructure Improvement; NW & WS Protection Strategy
7	8	E-Learning/distributed Teaching and Learning	Online Course Augmentation/eLearning
8	9	Enterprise-Level Portals (tie)	Luminis & Documentum CMS License Eval; Portal Enhancement or Luminis Implementation
8	7	Web Systems and Services (tie)	(facilitated by Enterprise level Portal projects)
9	-	Governance, Organization, and Leadership for IT (tie)	IT Policy, Planning & Governance; IT Services Leadership Team Implementation; IT Services Performance Management Enhancement; Project Office
9	-	Business Continuity/Disaster Recovery (tie)	Enhance Disaster Recovery Capabilities

Note: bolded issues are ones with significant change since 2003: they either advanced one place over the previous year, or appeared in the Top Ten for the first time.

EDUCAUSE Top Ten IT Issues Continued...
Top 10 Issues with the potential to become more significant (these should be on our radar screen).

2004	2003	Issue	Our projects (listed for the one issue that was not included above)
1	1	Funding IT	
2	2	Security & Identity Management	
3	3	Administrative/ERP/Information Systems	
4	10	Strategic Planning for IT	
5	4	Enterprise Level Portals	
6	5	Faculty Development, Support and Training for IT	
7	8	Business Continuity/Disaster Recovery	
8	-	Infrastructure Management for IT	
9	-	Support Services/Service Delivery Models (tie)	Customer Service Support Model; Storage and Service Pilot Implementation
9	6	Web Systems and Services (tie)	

Campus Computing Survey 2004

Changes from 2003 survey; 516 two-and four-year public and private colleges and universities in the US responded to the survey which was conducted during summer and fall 2004.

1. Colleges and universities are beginning to experience some relief from the budget cuts of the past few years. Private institutions have fared better than public ones. There was a decline in mid-year budget cuts when compared with 2003. Network security and administrative/ERP budgets were the most likely to receive increased funding.
2. Network security and upgrading/replacing administrative ERP systems emerged as the top campus IT priorities for research and public four-year colleges.
3. There is cautious support for Open Source applications among senior campus IT officers. Roughly two-thirds of respondents in public and private research universities agree that "Open Source will play an increasingly important role in our IT strategy." There is "affirmative ambivalence" about Open Source administrative/ERP applications.
4. Institutions are making significant efforts to respond to the concerns of media industry officials and Congress regarding copyright violations of digital commercial content. **[Note: this change is a factor for a project not anticipated in the 2004 IT Strategic Plan: Music services for students. Faculty copyright violation issues are also a continuing concern.]**
5. More institutions deployed wireless networks over the past year. Across all sectors, more than a third of college classrooms have wireless service (47.4 percent in private universities; 24.8 percent in community colleges).
6. More institutions deployed campus portals over the past year. A total of 37% of colleges and universities report a working (single sign on/initial sign on) campus portal).
7. Unchanged: Very few institutions assess the benefits of IT investments.

Gartner Group Top Ten Technologies for 2005

Following is a list of technologies Gartner feels will overcome important barriers and limitations in the next three years and will move from narrow niches to more widespread adoption by 2007. These technologies have the potential for competitive and internal value.

Top 10 Technologies	Comments	Recommended Actions
Instant Messaging (IM) via mobile and fixed devices	Provides real-time communication value with low overhead. Has potential to reduce email, voice, and SMS traffic.	Develop policies and a support model recognizing that IM is a primary means of how our students communicate.
OLED/LEP Displays <i>(Organic Light Emitting Diodes (OLED) and Light Emitting Polymer (LEP))</i>	New materials are being used to dramatically improve the operating capabilities of displays. They require very low power, provide very high contrast, can be read in bright light, allow for extreme wide-angle viewing, are flexible and thin, can be transparent; and can be used in dynamic signage.	Apply OLED/LEP to display requirements that exhibit deficiencies with current technologies in areas such as contrast, viewing angle or shape.
Taxonomies	Hierarchical breakdowns of subject categories from more general to increasingly specific. Provides a means of locating information within the growing flood of data through categorization and indexing in a scheme that is natural for the seeker to comprehend.	Devote at least 25% of the taxonomy budgets and resources to developing or acquiring common business vocabularies, dictionaries, glossaries and indexes.
Real-time Infrastructure (RTI)	To achieve goals of better resource utilization, lower total cost of ownership, and the ability to reflect business priorities in the IT application and technology infrastructure, a new computing model is needed. IT resources are shared and not isolated, organizational priorities determine the allocation of IT resources, and despite the unpredictable demand for IT services, service levels are predictable and consistent. Helps monitor, capture, analyze root cause and overt events that are critical to the organization's success, in real-time.	Organizations that do not evolve to RTI during the next 10 years will not be competitive (in price and service), will lose credibility with their customers and, thus, will risk their survival.
Location-aware Services	Locating moving items (people, goods, or other assets) or identifying known status can present challenges. Location-aware services using Wi-Fi, Bluetooth, GPS, cellular, mobile phone, RFID (Radio Frequency Identification) and other techniques provide solutions.	Build location-aware services from these mature or rapidly maturing location capabilities of wireless communications methods. Be aware of the many privacy implications.)

Gartner Top 10 Technologies Continued...

Top 10 Technologies	Comments	Recommended Actions
Internet Protocol (IP) Telephony	IP telephony adds function above and beyond a strict replacement of "plain old telephone service."	View IP telephony and VoIP (voice over IP) as functional layers composed of different vendors, stakeholders, technologies and evolution rates, which together deliver complete organizational value.
Software Treated as Services	Service-oriented development will change the way more than 80 percent of independent software vendors build, package, and sell software. Includes web services; Service-oriented Development of Applications (SODA), Service-oriented Architecture (SOA), just-in-time integration, and university data processed off-campus.	Educate IT and business process developers on c-commerce (collaborative commerce) and Web services concepts.
RFID Tags (Radio Frequency Identification)	RFID and similar wireless chips will evolve from a supply-chain technology into an enabler of value-added consumer applications, such as item location and status reporting. RFID will be the successor to bar codes; could be used for access cards toll pass, and gate pass systems; theft protection; and faster self-checkout.	Evaluate the potential advantages of RFID tags for high-value objects (classroom projectors), new services and sharp improvements in efficiency. As costs decrease, broaden the investigation to a wider set of uses.
Mesh Networks	Mesh Networks are wireless network in which each node can relay signals via several other nodes. Mesh networks will converge with RFID, are self-organizing, self-healing, robust, disaster-resistant and require no global management.	Progressive organizations needing to carry out simple sensing in inaccessible locations should conduct trials of sensor networks in 2004.
Grid Computing	Grid computing creates larger virtual computers than the actual servers than are achievable/affordable by present technology. If computers are owned by one entity, that is a computer cluster; it becomes a grid when there are potentially multiple owners of the pool of computers used.	Look for large-scale technical, scientific, and engineering applications that may be suitable to exploit grid technology.

Gartner Higher Education Strategic IT Investments

Resource: *Gartner Symposium ITXPO 2004, Michael Zastrocky, Higher Education Scenario: Strategic Information Technology Investments.*

1. Higher education institutions are facing major changes in the way they manage information resources.
 - The focus will shift in the next five years from improving student services and web-enablement to support for constituents with changing needs and expectations and support for outreach and recruiting.
 - The recruiting pool of high school students will shrink, causing the need for a change in recruitment focus to traditionally underrepresented minority groups.
 - Their needs for support and services will change the focus from internal to external.
 - E-learning will require direct access to external content and extra-institutional transactions will need to be automated.
 - For higher education to be more agile in responding to emerging needs, large projects need to be broken into smaller sets and aligned with the business and budget cycles rather than strictly a project cycle.
 - Quality must be pushed into the project process earlier.
2. As a result of the above and changes in society, student expectations for more choice in the technologies accessing services will be in conflict with the demand for a high quality of service. This will prove to be difficult to manage for IT professionals in higher education.
3. Although budgets are improving, higher education CIOs must bring future needs and expectations into the project and budget planning process.
4. Higher education institutions must begin to immediately recruit and train young IT professionals to ensure an orderly leadership transition in the next few years as CIOs and other IT leaders retire.
5. CIOs must plan for increased levels of support spending in a post-ERP budget.
6. SunGard's purchase of SCT has caused distraction without contributing visible benefits to higher education customers (also the case with PeopleSoft/JD Edwards, Oracle/PeopleSoft).

Gartner Higher Education Strategic Information Technology Investments Continued...

7. Higher education institutions with prospect-focused (CRM – Customer Relationship Management) enrollment management systems in place by 2007 will have a competitive advantage in meeting their enrollment objectives through 2011. (Communications via email, phone calls, web forms, letters, reply cards, portal visits, campus visits will all be used.) The use of CRM tools in enrollment management will become standard practice by 2009. In addition to a student recruiting tool, this is also important for alumni management.
8. By 2009 (or perhaps sooner), more than 50 percent of all courses and sections offered will be a hybrid of face-to-face and online learning.
9. Academic libraries should plan to offer patrons Open URL resolvers and federated search portals by 2006 to make the best use of resources and research support.
10. By 2007, 70 percent of e-learning platform functionality will be available through open source. Monitor open-source and collaborative academic e-learning products, but do not expect turnkey solutions to be available before 2007.
11. Institutions looking to include open source solutions in e-learning sourcing decisions should adapt product RFI, RFP and evaluation processes to measure OSS solution providers' vision and ability to execute, including a viability assessment and examination of the product road map. Base decisions on the overall value received rather than on acquisition cost savings.
12. Effective security is based primarily on process, rather than product. Security must be integrated into institution-wide network and system management initiatives. Evaluate security process maturity and plan for security evolution before investing in security technologies and services. Transition your institutional security model to a point-to-point architecture. Security has value as a business-enabler.
13. E-learning has been less disruptive than many predicted, but it will still be the richest source of IT innovation during the next five years. Now that basic course management systems are ubiquitous, institutions are grappling with the content creation, distribution and management issues that make up the biggest component of online instructional delivery cost. (Note: We are grappling with this now and look to Blackboard's content system to help.)

EDUCAUSE ECAR Study on IT Alignment

This research report was conducted by the EDUCAUSE Center for Applied Research in Fall 2003, consisting of a quantitative online survey of 483 EDUCAUSE institutions, qualitative interviews with 22 higher education IT executives, and an in-depth review of 57 IT plans found on the web, plus 4 case studies from on-site visits.

1. Those institutions that reported effective IT governance, IT planning, communication, measurement and assessment also reported IT alignment.
2. At institutions with clear vision and priorities, 91% perceive that IT is aligned. Without clear institutional vision and priorities, only 57% say that IT is aligned.
3. A total of 93% of institutions reporting an effective IT governance process also perceive strong IT alignment. Only 64% of institutions that do not report effective IT governance perceive strong IT alignment.
4. A total of 78% of institutions link their IT plans to their institutional budget process. Nearly 59% say funding for IT initiatives is allocated when the plan is approved. Of those who do not (22%) link IT plans and institutional budgets, half indicate that IT plans are not aligned.
5. Communication is a crucial piece of alignment. Unless a plan is shaped by many and known by all, the view of IT may be incomplete, incorrect, or incoherent.
6. Measurement and assessment are not yet wide-spread; actually, very few institutions do this. Those who measure tend to use “softer” methods such as self-assessment most frequently (74%). Customer satisfaction surveys are not yet standard practice with 47% using them. Only a handful of institutions use full assessment methodologies such as the Malcolm Baldrige process or the Balanced Scorecard. Performance dashboards are relatively new, but gaining popularity (9% of institutions report using them).
7. Characteristics of ‘adaptive’ organizations include the following:
 - Create governance structures that can be convened quickly, have clear directives, and hold genuine decision making authority.
 - Make planning a continuous process.
 - Track both internal and external environments, provide real-time information, and foster small and constant adjustments to changes.
 - Create flexibility in budget processes, particularly to support quick reallocation of resources.
 - Shift towards project-oriented organizations rather than function-oriented organizations.
 - Make creative use of contractors, shared services, outsourcing and partnerships to reduce fixed costs.
 - Reward employees for being responsive to changing needs, maintaining high skill levels, and contributing to strategic directions.
 - Ensure that the fundamental IT architecture maintains currency and at the same time, support changing user demands, new user technologies, and evolving business practices.

ECAR 2003 Core Data Survey

The 2003 survey was completed by 837 higher education institutions.

1. There was an 8% increase in the number of total responding institutions using a Technology Advisory Committee for strategic planning advice when comparing 2003 figures to 2002 (growth from 335 institutions in 2002 to 376 institutions in 2003). (We examined peer, aspirational, and Ohio IUC respondents, but the total respondents in those categories is too small to be a useful comparison.) Student advisory committees are used by 21% of all institutions; technology advisory committees are used by more than 73% of the respondents. An Academic/Faculty Committee is used by 63% of institutions.
2. There was a 1.2% increase in the number of institutions that have a stand-alone IT strategic plan when comparing 2003 to 2002 (growth from 375 institutions in 2002 to 381 institutions in 2003).
3. There has been nearly a 10% increase each in the number of institutions that involve the Chief Financial Officer and Chief Academic Officer in development of campus policy with regard to IT security and privacy.
4. The percentage of institutions reporting they have a technology fee has remained relatively flat from 2002-2003 (increase of 1%; 439 out of 833, or 52.7%, responded 'yes'). Total funds generated was \$1,468,300 (mean) in 2003; \$1,349,806 in 2002. The group deciding how the fee is spent with the largest percentage of growth is Senior Administration (+4.7% from 2002 to 2003). Next largest growth: Campus Committee, +2.8%. Of those institutions reporting they have a flat fee per semester (n=175, 39.9%), the median fee collected is \$75 per semester. The median fee for those collecting a flat fee per year is \$150 (n=58, 13.2%).
IUC schools reporting:
University of Akron: \$13 per credit hour
University of Cincinnati: \$85/quarter
University of Toledo: 1.5% of tuition
OSU, OU: no fee
5. There has been a .8% increase in the number of institutions reporting a 24/7 help desk (39 institutions, or 4.7%). Even though the percentage increase is small, there is significant interest as evidenced by discussions at EDUCAUSE 2004 on how to enable 24/7 support.
6. There was a 4.3% increase in the number of institutions reporting that "We offer activities and opportunities for faculty who use technology in innovative ways to share their experiences (e.g., technology fairs, brown bags, etc.)." (591 institutions, 70.6% of all respondents)
7. There was a 7.4% increase in the number of institutions reporting classrooms with wireless technologies that are centrally scheduled. (215 institutions, 25.7% of all respondents)

EDUCAUSE ECAR Study on Customer-Centered IT Support at Indiana University

Source: *Customer-Centered IT Support: Foundations, Principles, and Systems*, November 9, 2004; addresses improvements in IT support at Indiana University.

1. Timely, effective IT support is critical to sustaining quality and efficiency. The pervasive, portable computing culture has elevated the value of IT support.
2. IU had previously expanded phone support hours, and ultimately decided they required a new support model that would enable around-the-clock delivery of support. IU implemented the "Online Support Environment" (OSE) for support of computing, telephony, media, IT facilities, and instructional services in self-service mode through a Web front end at <http://uits.iu.edu>.
3. IU calculated the cost of each support delivery method:
 - a. Walk-in visits to the campus Support Center: \$13.07 per visit
 - b. Phone-based help: \$9.32 per call
 - c. E-mail based help: \$7.65 per contact
 - d. Knowledge Base: \$.06 per hit
4. The IU Knowledge Base is one component of the OSE; they wrote an interface for the OSE that draws information from the Knowledge Base and other existing web pages, reformatting the information to present to the user in real time. The Knowledge Base is considered the single repository of all support and service information.
5. IU's focus is on web self-help. "Users who can access self-service help tools from their desktops have fewer interruptions in productivity...Self-service support and services delivered to the desktop promise significant gains to higher education...Online delivery of IT support can help keep IT in its place in the background – as a tool in service of the academic mission."
6. OSE is building a culture of self-reliance and a culture not averse to change and risk.

EDUCAUSE ECAR Study on Customer Relationship Management

Source: Relationship Management in Higher Education Information Technology, June 24, 2003.

1. Relationship management is a holistic, integrated, enterprise-wide approach to managing customer relationships over time. Ultimately, a relationship management strategy helps align IT resources with customer requirements, and it can help alleviate the following common criticisms of IT:
 - a. Lack of responsiveness to academic and business needs.
 - b. Ineffective use of IT resources.
 - c. Inability to effectively and quickly deploy new technology.
 - d. System silos organized around business units and technology.
 - e. Poor communication between IT and its institutional constituents – faculty, administrators, students.
2. Relationship management differs from traditional customer service in that it represents a “systematic approach to developing organizational structures and inter-unit processes, whereas customer service is typically based on a transaction, event-oriented approach to service.” It includes functional areas of support, customer service, planning, marketing, and strategic account management. It implies effective coordination and communication among these areas. A well-executed relationship management strategy ensures that the *entire* IT organization is properly aligned around customer requirements and business processes.
3. The article presents overviews of the customer relationship management programs at Yale, MIT, Princeton and UCSD. The use of IT liaisons, whether through a formal program or an informal one, has been a key success factor for aligning IT services to customer and institutional needs.
4. The report concludes that “Adding to its relevance in the higher education environment, relationship management can be a key strategy for dealing with several challenges unique to the academy, such as the often politicized environment, strong emphasis on consensus building, institutional inertia, funding and budgeting issues, and individual or faculty veto power. Significant changes in the expectations of incoming students also contribute to the relevance of a relationship-management strategy.”

Fall 2004 Internal Environmental Analysis

Because of the extensive internal environmental analysis completed during the IT Strategic Planning Project during fall 2004, a more informal internal environmental analysis was conducted. Using IT Services, the leadership team, and the many tactical project teams, Miami University IT environmental trends have been tracked and highlighted below.

Miami University has not experienced significant changes in technology needs or trends since the fall 2004 internal environmental analysis. Following are the themes that reflect the status of IT at Miami University.

Customer Focus and Relationships

- Clients, both faculty and staff, seem to be more willing to approach IT Services with requests for new services. A willingness to collaborate across functional areas has also increased.
- A broader group of people beyond the “early adopters” are talking about technology and its impact at Miami University.
- Because of the involvement during the IT Strategic Plan development in 2004, the regional campuses have great expectations for additional support for IT. This expectation provides a great opportunity to build on these relationships. Representatives from the regional campuses are involved in all of the major tactical projects.
- University constituency groups seem open to new service models and ways of doing business. The move from functional involvement, or silo-approach, to cross-functional involvement is being well received. The campus partnership program has received an up swell of support and excitement. However, many of the technology support providers are struggling for their relevance and their role given the new IT environment.
- IT Services is experiencing a continued expectation that we provide leadership in technology innovation especially through the TSRs. The area of technology innovation is still an area where the university can improve.
- As we increase services, clients are unclear how they will interface with IT Services. The concept of one face to the customer/client needs to be explored.
- A continued need for repositories (SFA) is being expressed including a research tool, slide libraries, and on-line storage for objectives. Solving this issue requires a joint effort between the library and information technology.

Student Needs

- Conversations continues concerning a student laptop program including tablets and PDAs.

IT Services

- In spite of additional workload, there is a much greater enthusiasm among the staff.
- IT Services is being viewed more favorably overall by the university.
- IT Services is experiencing a much higher expectation for the delivery of service demanding us to move faster.
- IT Services is experiencing an internal shift to provide a quality solution vs. implementation a solution that meets a certain dollar or predetermined expectation.
- Even though IT Services is pushing out a great deal of communication, especially compared to the past, employees are still concerned whether the general population is reading it.
- IT Services is experience more willingness to collaborate among our peers.
- IT Services is not as silo oriented -- much more cooperative than previous groups -- more efficient
- Experienced multiple hybrid types of services using IT Services staff and outside vendor support (Cornelius & Associates, Wireless).

- IT Services is giving more attention and priority to our internal management responsibilities including performance management and project management.

Just Do It!

- Certain constituency groups who were involved the environmental analysis last year and in the resulting planning process are expressing frustration about having to have too much discussion. They are asking us to move ahead into action.
- With the large investment allocated, and people are ready for action
- With the expectation that the state budget could be dramatically cut, we are focused on fiscal conservatism, i.e. we need to be able to produce cost savings from our work
- IT at Miami is experiencing an Incredible opportunity resulting from the strategic plan direction. The existence of higher-level strategy is new, and we are still working to leverage it.
- IT Services is being challenged to figure out a way to capture some risk-based ventures and allow us to more effectively approach new technologies rather than only run production services.

Policy & Governance

- Doing more means more concern about how to do it. Greater demand for policy, guidance as been expressed, because we are expanding into new and unfamiliar areas requiring guidance and policy.
- Dr. Garland provided license to improve governance structure and processes – including information technology.

Security Requirements

- We continue to experience continued increases in security requirements -- GLB as example.

University Changes

- Changes in the top level leadership within the university -- HR, Finance, etc.
- Dr. Garland encouraging improvement in governance structure and processes.
- President has endorsed the concept of adding multi-function buildings on the campus that will support general classrooms, IT support space, moving some of the things library does into a learning commons area, etc. IT Services must take the lead and benchmark some other schools where this has happened.
- People are wrestling with how to preserve the values of the past and embracing new things -- we haven't defined a way to make it easier for the culture -- anything new should be balanced with how it relates to the university standards/values/tradition etc.

Intellectual Properties

- Faculty are wrestling with intellectual property issues -- institutional policies for E-learning are missing.

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- Growing recognition that implementation of technology is quite costly.
- We have strong executive level support for a student technology fee.
- Growing awareness that we want/need to know what the total cost of IT is across the university beyond just IT Services -- total cost of operations.

IT Planning, Policy & Governance Project Scope Document

Project Information

Project Name: IT Planning, Policy & Governance Project
Date: January 19, 2005
Project Sponsor: Reid Christenberry
 Vice President for Information Technology
Project Steering Team: IT Executive Council Vice Presidents
Project Manager: Debra Allison
 Deputy Chief Information Officer
Project Consultants: Kay Roman
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Document History

Document Version	Document Version Date	Revised By	Requestor	Approved By	Description(s) of Change
# 1	10/28/04	D. Allison	D. Allison	R. Christenberry	Combine IT Policy and Governance and IT Continuous Information Technology Planning Projects
#2	1/19/05	K. Roman	D. Allison, J. Goerke		Add the governance component of the Banner Lifecycle & Governance project to the scope of this project.

1. Objective:

- 1.1. Operationalize the information technology strategic planning process and ensure ongoing and coordinated information technology planning that aligns with the goals of the university.
 - 1.1.1. Operationalization of IT Planning Process
 - Explore, develop and recommend a model for ongoing operationalization of the IT planning process throughout Miami University by October 31, 2004.
 - Begin implementation of the model in October 2004 through a pilot project with the Hamilton Campus and complete by January 31, 2005.
 - Assess the pilot project and adjust the model.
 - Implement the IT planning process model with the administrative and academic units by June 30, 2005.
 - 1.1.2. Continuous Implementation of IT Strategic Planning Process

Continue the IT strategic and tactical planning process into FY05 including:

 - Environmental Analysis
 - Revisit the IT Strategic Plan
 - Development of tactical goals for FY06
 - Development of initial scope documents for prioritization and budgeting.
- 1.2. Develop a recommendation for a comprehensive model for technology planning, policy, and governance, that encompasses information technology resources and units across the university as well as administrative and academic functions.
 - 1.2.1. Develop a recommended ongoing IT governance model and advisory function to the CIO.
 - 1.2.2. Develop a university-wide plan/model for the effective and efficient use, lifecycle planning and governance of Banner (as a model for other administrative systems).
 - 1.2.3. Develop and implement a model for developing information technology policies within the governance structure.
 - 1.2.4. Develop a recommended process for reviewing and prioritizing university-wide IT initiatives as well as a process for reviewing and prioritizing limited scope IT initiatives.

2. Background & Narrative:

- 2.1. Miami University has completed an IT strategic plan for university-wide information technology. To ensure implementation of the plan, evaluation of the tactics, and ongoing planning efforts, IT planning must be operationalized and become a way of doing business for information technology at Miami.
- 2.2. Currently, IT policy and governance is distributed throughout the university without a focal point for escalating and resolving issues. The need for more formalized approaches to policy and governance emerged during the internal environmental phase of the IT Strategic Planning project.
- 2.3. The internal environmental analysis conducted during the IT Strategic Planning Project indicated that the use and support of the Banner system is in need of significant improvements.
- 2.4. Banner was implemented during fall 1999. Modifications were made to the system to support Miami business practices resulting in problems in making routine and significant upgrades and modifications.
- 2.5. Miami does not have centralized support and stewardship for the Banner system to ensure effective coordination, informed decision making, and lifecycle planning.

3. References:

3.1 IT Strategic Plan Goal 6.2 Information Technology Planning

6.2.1 Strategic Planning: Develop, gain approval for, and fully implement a university-wide information technology strategic plan with means for continuous improvement. Establish and implement an ongoing information technology planning process that continually assesses and evaluates information technology at Miami.

6.2.2 Financial Planning: Prepare a long-range university information technology financial plan spanning operating, capital and development budgets, and incorporating long-term information technology needs.

6.2.3 Quantitative Measurements: Develop quantitative measures that will assess the accomplishment of the strategic goals.

6.2.4 Regional Campus Information Technology Plans: Partner with and support the regional campuses in the development of their information technology plans within the context of the overall university information technology plan to: 1) facilitate the individual mission of each campus, and 2) recognize points of integration and coordination with the university information technology plan.

6.2.5 Unit Information Technology Plans: Ensure the college, schools, libraries, and administrative units develop information technology plans within the context of the overall university information technology plan to: 1) facilitate the individual mission of each unit, and 2) recognize points of integration and coordination with the university information technology plan.

6.2.6 Communications: Develop and implement ongoing coordinated information technology communications and feedback mechanisms for students, faculty, and staff.

6.2.7 Integration with University Planning: Ensure that information technology is integral to all major strategic planning efforts across the university.

3.2 IT Strategic Plan Goal 6.1 Information Technology Policy and Governance

6.1.1 Information Technology Governance Model: Develop a comprehensive information technology governance model that encompasses information technology resources and units across the university.

- Assess the roles, responsibilities, overlap, and effectiveness of the wide range of committees and functional organizations addressing information technology issues.
- Develop recommendations for and implement a university governance structure for information technology.
- Formally implement new information technology advisory committees to ensure university-wide input and involvement.

6.1.2 Information Technology Policy Development Model: Develop a model for developing information technology policies within the governance structure.

- Assess the current means of developing and managing information technology policies and procedures.
- Explore ways of involving students, faculty, and staff in the identification and handling of information technology issues and concerns.
- Institute oversight and feedback mechanisms for students, faculty, and staff to review policy.

3.3 Strategic Plan Goal 5.2 Banner System Enhancement and Support: Consistent with imperative 5.1, implement a university-wide project to develop a plan for the effective and efficient use of Banner to include:

- Centralized support and stewardship of Banner
- Full exploitation of the capabilities of Banner
- Reporting services
- Review of business processes to include optimization of services to students, faculty and staff.
- Upgrades to Banner and removal of Miami-implemented modifications to Banner that are no longer needed
- Assessment of functionality required to reduce unnecessary shadow systems across the institution.
- Ongoing user training
- Ongoing responsive service and support

4. Deliverables:

- 4.1 Implementation of the ongoing IT planning process that fully integrates with the university planning and budgeting processes.
 - 4.1.1 Quantitative measurements for the IT strategic plan.
 - 4.1.2 Pilot project for IT strategic planning for units (Hamilton ITSP project).
 - 4.1.3 Environmental analysis during fall 2004.
 - 4.1.4 Updated (if necessary) IT strategic plan.
 - 4.1.5 Tactical goals for FY06.
 - 4.1.6 Initial scope documents for prioritization.
- 4.2 Recommendation for a university planning, policy, and governance structure for information technology by June 2005.
 - 4.2.1 Assessment of the roles, responsibilities, overlap, and effectiveness of the wide range of committees and functional organizations addressing information technology issues.
 - 4.2.2 Communications mechanism for ongoing communications and feedback from students, faculty, and staff.
 - 4.2.3 Creation of new information technology advisory committees to ensure university-wide input and involvement.
 - 4.2.4 Assessment of the current means of developing and managing information technology policies and procedures.
 - 4.2.5 Recommendations for ways of involving students, faculty, and staff in the identification and handling of information technology issues and concerns.
 - 4.2.6 Recommendations for oversight and feedback mechanisms for students, faculty, and staff to review policy.
 - 4.2.7 Recommendations for a university-wide plan/model for the effective and efficient use, lifecycle planning and governance of Banner (as a model for other administrative systems).
 - 4.2.8 Recommended process for reviewing and prioritizing university-wide IT initiatives as well as a process for reviewing and prioritizing limited scope IT initiatives that occur outside of the normal planning cycle.

5. Dependencies & Impacts:

- 5.1. Hamilton Campus IT Strategic Planning Project
- 5.2. Research Support Project
- 5.3. Classroom Technology Support Project
- 5.4. Strategic and Tactical Security Project
- 5.5. Change Management initiative (not yet a project)
- 5.6. Innovation Support Model Project
- 5.7. Project Office
- 5.8. Technology Funding Model Project

6. Boundaries:

- 6.1. The model developed will include all information technology governance processes across the university.

7. Assumptions:

- 7.1. President and the Interim Provost are in support of governance review, in light of the President's 2004 State of the University Address, and the Interim Provost's convening of a team to reevaluate governance.
- 7.2. We will continue to receive broad university participation in the planning.
- 7.3. Resources will be dedicated to the project by both IT Services and the representatives on various committees.

8. Risks:

- 8.1. Broad calls for student, faculty and staff participation in the IT Strategic Plan project are resulting in push-back from clients with follow-on projects. Clients feel that we have enough input; however, we need more focused input as the resulting projects get underway.
- 8.2. Lack of resources due to other priorities arising
- 8.3. Since this is a study project only at this time, the groups must not assume jumping into implementation immediately.