## Educause 2010

## Strategic Planning Discussion Session Notes

The IT Strategic Planning discussion session was held at the Educause 2010 Conference on October 14, 2010 in Anaheim California (<http://www.educause.edu/E2010/Program/DISC61>). The session was chaired by Debra Allison, Interim Vice President for Information Technology, Miami University, Oxford Ohio and attended by 38 individuals, representing 33 institutions. The session was one hour in length and resulted in an opportunity for excellent discussion amongst participants.

 The session notes are summarized as follows. Errors/omissions of substance are unintended and should be communicated to the session scribe: Kathie Brinkman Kathie.Brinkman@muohio.edu

**1- Strategic Plan time horizon**

Is the planning horizon changing from the traditional 5 year horizon to a shorter period?

* The majority of institutions attending the constituency session indicated that the planning horizon has shifted to 3 years, due to the accelerated pace of technology change and economic factors.
* A few institutions indicated that they’re maintaining a 5 year plan, with one institution using a 4 year planning horizon.

**2- Annual renewal of the strategic plan**

How do we keep the strategic plan alive in between major planning cycles? (Shelf-ware avoidance)

* At one institution, an internal analysis is done + an external scan, utilizing Horizon report, Educause core data survey, etc. for an annual refresh.
* At several institutions the process involves reviewing the list of strategic initiatives that were identified in the planning process for current relevancy and adjustment, as needed. Then annual projects that tie back to the strategic initiatives are identified. For reporting to the institution, a grid of the annual projects is inserted into the strategic plan, thus linking projects undertaken each year back to the strategic goals.

**3- Prioritization of projects**

Are institutions prioritizing projects at the university level or is the prioritization done at the divisional/departmental level?

* There was a mix of responses on this question – many are not currently prioritizing projects at the university level, but desire to do so.
* Those who are prioritizing at the university level shared the following tips/techniques:
* Providing the project review board with sufficient data to make informed decisions on prioritization is a daunting task, both for IT and for the board members. To-the-dollar and hour data is collected by IT, but is an overwhelming amount of data for board members to absorb.
* Having a scoring mechanism is a key feature of prioritization; several institutions use this + use an over-ride feature for projects that must be done but don’t score highly enough. A measure of the maturity of the scoring mechanism and of the organization is to have few projects utilize the over-ride.
* It’s as important to choose what isn’t to be done as well as what will be done.
* Project review boards are normally comprised of IT + a representative from each university unit
* One institution established rates for service to make the true cost of work clear to requesters. The institution does not actually charge back, but does use “show-backs” (recommendation of this speaker is to see the Educause presentation titled “Defending the IT Budget” for details: <http://www.educause.edu/Resources/DefendingtheITBudget/173081>)

**4- Evaluation of the strategic plan**

Institutions expressed various means of evaluation including:

* Set key metrics and report against them
* Cost: are products and services being provided at competitive rates?
* Quality: are clients satisfied with the end product and the process?
* Present information to constituents on percentage completion of strategic goals, and detail of what was accomplished
* Intake process for strategic projects at one institution requires that alignment with strategic goals be stated in advance, with identification upfront on how the project outcome will be measured (quantity as well as quality). Score card presented to the campus that reports on success of these projects.
* Some institutions benchmark against other institutions to show strength of strategic initiatives

**5- Communicating the strategic plan to the campus**

Once the strategic plan is created, how do ensure that the campus is aware and invested?

* Take every opportunity to tie university projects and initiatives back to the strategic plan
* Some institutions use commercial software to track and communicate their plans (mentioned in the session: Weave Online; Tk20; etc.)
* Involve stakeholders in building strategic plan as well as communicating the plan to their area of responsibility; this sends a strong message of endorsement.

**6- Defining the strategic plan**

How do we put the plan together?

* Incorporate the language/words used in the institution’s strategic goals in the IT strategic goals. Ensure that the alignment goes deeper than language – true alignment with institutional goals is needed.
* Consider initiatives that span not just university divisions, but also those that are good candidates for state initiatives and across state systems.
* When considering IT goals, ask the question: “does this goal advance the university?”
* Key is to also review accreditation standards and look for alignment

**Additional strategic planning resources that were identified by session participants :**

* STRATPLAN constituent group: <http://www.educause.edu/groups/stratplan> details the web-based resources available as well as ability to join the listserv set up for communication among those interested in discussion of this topic
* Horizon Report –produced annually via collaboration between The New Media Consortium and the Educause Learning Initiative. Its focus is to identify new technologies that have an impact on teaching and learning.
* There are many Educause resources available on use of the Horizon Report: <http://www.educause.edu/search?quick_query=horizon+report>
* An Educause 2010 session described use of the report: “The Horizon Report in Action: Deploying Innovation Locally” <http://www.educause.edu/E2010/Program/SESS055>
* Miami University shared its strategic planning website location: [www.muohio.edu/itplan](http://www.muohio.edu/itplan) Resources used by Miami University for its external environmental scan include the following (depending upon availability for each year):
	+ EDUCAUSE Top Ten IT Issues
	+ EDUCAUSE ECAR Study of Undergraduate Students & IT
	+ EDUCAUSE Core Data Survey
	+ Various other EDUCAUSE and ECAR reports
	+ The Horizon Report
	+ The Campus Computing Survey
	+ Gartner – Key Issues for Education
	+ Gartner– Setting IT Priorities in Higher Education
	+ Gartner– The Business Impact of Social Computing
	+ Gartner– Hype Cycle for Higher Education
	+ Various other Gartner reports