The IT Strategic Planning discussion session was held at the EDUCAUSE 2011 Conference on October 20, 2011 in Philadelphia, PA (http://www.educause.edu/E2011/Program/DISC45). The session was chaired by Debra Allison, Vice President for Information Technology and CIO, Miami University, Oxford Ohio and Andrew Clark, Associate CIO / Chief Process Architect, Syracuse University. It was attended by 88 individuals, representing 80 institutions. The session was 50 minutes in length and resulted in an opportunity for excellent discussion amongst participants.

Issues and questions discussed by the STRATPLAN constituent and discussion group at the annual meeting are as follows:

1. What new things are we seeing in IT strategic planning?
   a. Idea of “crowd sourcing” as input to the strategic plan. Seed a web site with a vision and ideas and allow students, faculty and staff to vote “thumbs up” or “thumbs down” and comment on ideas. Also, allow them to add their own ideas and award a prize for one or two ideas that are felt to be the “best” ideas. You’ll get a mix of visionary ideas and operational issues. It’s important to peel off the operational issues and immediately work on fixing them, since if your institution doesn’t feel you are good at “running the trains on time” they won’t want to hear you talk about a future vision.
   b. Some organizations are thinking a bit more broadly about the topic and considering strategy making. They tend to think of both deliberate approaches (a la Michael Porter) and emergent approaches (a la Henry Mintzberg). While “strategic planning” is part of the effort, “strategy making” is the superset inclusive of it and other pieces. A deliberate strategy or “positional” approach presumes one can predict the future. That is difficult, if not impossible nowadays. A different approach has to do with scenario planning; developing possible scenarios (typically 15 or more years in the future) and developing strategies that fair well in ALL those possible futures. Such strategies are the most robust and probably the best to use. A reference was made to a Schwartz book (see complete reference below) that presents an approach to developing scenarios.

2. How do we ensure alignment with the institution’s strategic goals?
   a. A reference was made to the book “Real Business of IT” (see complete reference below) where in the author recommends IT organizations don’t talk about aligning their goals with an organization’s goals. That author mentions that other parts of the organization (for instance Sales or Marketing) don’t talk about such things and believe it lessens IT’s value in the eyes of others. The author further recommends that IT’s goals and strategies should be developed to show how what IT does impacts the organization and delivers output and outcomes the organization cares about.

3. How do you start when there is no institutional strategic plan to guide you?
   a. In the absence of an institutional strategic plan, we began with consultants conducting interviews of the executives (president, VPs, deans and other key leaders) about their views on the institution’s most significant opportunities and strategic needs. By the
time those interviews were completed, it became clear that there was quite a bit of consistency and we were able to build on those comments as a sort of ad hoc strategic plan. While not ideal, it was effective.

b. We also talked a bit about looking at how the organization spends money and other actions as a way to “deduce” the organizations strategic goals, documenting our deductions, vetting the thoughts and then developing IT strategies and goals to support and provide value to the organization.

4. What are some of the best practices when communicating about strategic planning or the strategic plan?
   a. Use a blog like IT Vanderbilt to communicate with users.
   b. Monthly email about what IT is doing.
   c. Have the Project Manager send a monthly report on the work completed.
   d. Include information regarding projects in the Budget.

5. What ideas do you have for keeping the IT strategic plan relevant?
   a. We talked a bit more about emergent strategies (Andy referenced a 2001 Harvard Business Review article “Crafting Strategy” by Henry Mintzberg) and how organizations need to be in touch with their environment. The classical SWOT (Strengths, Weaknesses, Opportunities and Threats) and other information from an environmental scan provide great information for the deliberate or positional type of strategy making. However, to remain relevant organizations must be vigilant to what is happening around them – sort of an on-going environmental scan. Our environment is now so dynamic, that as soon as we agreed to a set of strategies, goals and objectives, something changes and we must be able to adapt.

6. How do you operationalize the IT strategic plan? How do you measure progress?
   a. In some sense this is the tactics that support the strategies; the operations and services that must go on. One measure is certainly “keeping the lights on”. Another is progress toward accomplishing your goals and objectives.

Andy referenced the following two books related to the above discussion:
- Real Business of IT: How CIOs Create and Communicate Value by Richard Hunter
- Art of the Long View: Planning for the Future in an Uncertain World by Peter Schwartz