“I am looking for someone to share in an adventure that I am arranging, and it’s very difficult to find anyone.”

– Our CIO

“We should think so - in these parts! We are plain folks and have no use for adventures. Nasty disturbing uncomfortable things. Makes you very late for dinner.”

– Us

An Unexpected Journey: The Quest for a Campuswide IT Strategic Plan
Why take the journey?

• Support the University’s strategic plan
  “...provide a vision and framework for how the university’s comprehensive IT environment can best support and accelerate achievement of the mission, vision and goals of NC State...”

• Engage the entire University IT community

• Share & collaborate is the only path to success

• Guide the process, not create the plan
“Loyalty, honor, and a willing heart. I can ask no more than that.”
As we describe our journey:

- Mark off key strategic planning words on your paper (5 in a row, or 5 diagonal wins!)

- Questions: [http://go.ncsu.edu/itstratplan-poll2](http://go.ncsu.edu/itstratplan-poll2)
  On back of your Bingo sheet!
“We’re going on an adventure…”

Forming, Storming, Norming, Performing

Planning the process, not processing the plan...yet

Image source: http://atolkienistperspective.wordpress.com/2013/08/05/the-hobbit-an-unexpected-journey-a-review/
“You’ll not be the same when you come back...”

- Focusing on changing the culture, not just creating a plan—the process is just as important as the final plan
- Developing and facilitating processes to help engage stakeholders and constituents
- Transformation of the team over time—respectfully challenging each other with new ideas and alternatives
- Serving as the “glue” for the process
**Conduct Environmental Analysis (External & Internal)**
- Identify stakeholder groups
- Conduct external environmental scans
- Conduct internal environmental scans
- Prepare data to share with ITSAC/CITD

**Data Analysis**
- June 12, 2013 - Data Review Session (CITD/IT Gov. Subcommittees)
  - Data review and analysis
  - Strategic Issue Identification
- July 24, 2013
  - Develop first draft of Strategic Goals (ITSAC/CITD)

**Goals / Guiding Principles & Strategy Development**
- August 20, 2013
  - Develop Guiding Principles (ITSAC/CITD)
- September 20, 2013
  - Refine & Develop Strategic Goals (ITSAC/CITD)
  - Refine Guiding Principles
- Nov. 1 & 12, 2013
  - Strategy Development Session (ITSAC, CITD & Gov. Committees)
  - Develop first draft of strategic plan
    - Guiding Principles
    - Strategic Goals
    - Strategies

**Finalize Plan**
- Hold critical stakeholders meetings for review of plan draft
- Get ITSAC, CITD & EO final approval for plan
- Roll out plan to Campus Community

**Develop Action Plans**
- Charter teams to develop Action Plans
  - Create measurable objectives and tactics
  - Develop metrics for evaluation
  - Establish timeline for continued plan review and adjustments
Conduct Environmental Analysis (External & Internal)

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- Identify stakeholder groups
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Data Analysis

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  Develop first draft of Strategic Goals (ITSAC/CITD)
**IT STRATEGIC PLANNING PROCESS**

**Timeline**

**Stage**

**Actions**

**Conduct Environmental Analysis**
- External & Internal

**Data Analysis**
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**JANUARY – JUNE**

**JUNE – JULY**

**AUGUST – OCTOBER**

**NOVEMBER – FEBRUARY**

**MARCH 2014 →**

**Environmental Analysis**
- Identify stakeholder groups
- Conduct external environmental scans
- Conduct internal environmental scans
- Prepare data to share with ITSAC/CITD

**Data Analysis & Strategic Issue Identification**

**Develop, Refine & Align Strategic Plan**

**Finalize & Integrate Plan**

**Implement, Monitor, Evaluate & Adjust**
“So this is your purpose? To enter the mountain?”

• Getting buy-in into the plan
• Dealing with “territoriality”
• Focus on the cohesive/collective for the good of all
“I would take each and every one of these dwarves over the mightiest army”

• Keeping the process “honest”
• Engaging the colleges is critical for success
• Perspectives of faculty & student needs
“Envoys from all seven kingdoms have come…”

- Input & participation by campus is critical to know needs:
  - Cyberinfrastructure to meet recent NIH / NSF requirements of Data Management Plans
  - Hardware, courseware, networks, rooms, support for MOOCs and flipped classrooms
  - Research simulation, analytics
  - Facilities integration into the cyberinfrastructure

Image source: http://cstm.mymiddleearth.com/files/2012/12/All-Dwarves.jpg
IT Guiding Principles

How we want to operate—as a partnership—leveraging both centralized and localized resources to meet the strategic goals of the university

1. **Alignment**: Our IT decisions will align with NC State’s strategic plan.

2. **Resources**: We will allocate campus cyberinfrastructure resources based on providing the greatest value and benefit for the NC State community.

3. **User Focus**: User needs will be a key component in all IT decisions.

4. **Collaboration**: We will work within and across organizational structures to meet strategic goals and identify opportunities for innovation and improvement.

5. **Transparency**: We will be transparent in our decision-making and resource use.

6. **Innovation**: We will value innovative and creative thinking.

7. **Data Stewardship**: We will provide a secure but accessible data environment.

8. **IT Knowledge & Skills**: We will value technology skills development for the IT community.
IT Strategic Goals

**Innovate**
- Goal 1: Lead IT Innovation
- Goal 2: Leverage Data

**Manage**
- Goal 3: Maintain & Enhance University Cyberinfrastructure
- Goal 4: Optimize IT Resources through Governance

**Collaborate**
- Goal 5: Cultivate a Collaborative IT Culture
- Goal 6: Foster Connectedness of Communities
“I do believe the worst is behind us now!”

Phase 2 - Implementation:

- Implementation team gathering initiatives to be expanded by IT governance
- Develop a timeline and prioritizing initiatives
- Include IT management as well as projects

Ten things to keep you from dying while on your quest

1. Bring along a guide (facilitator).
2. Establish definitions and rules of engagement for the team (see resource docs).
3. Use the heck out of collaborative tools.
4. Primary focus is on changing the culture, not on simply creating a plan.
5. Determine your key stakeholders.
Ten things to keep you from dying while on your quest

6. The IT strategic plan MUST support the university-wide plan.

7. Consider your data-gathering processes, and how you will analyze gathered info.

8. Communicate, communicate, ...

9. Keep the plan concise and manageable.

10. Realize it’s a journey that will take time and commitment.
Questions for us?
Some items for your knapsack

NC State University IT Strategic Plan
• http://go.ncsu.edu/itstratplan

IT Strategic Planning Process Team Documents
• http://go.ncsu.edu/itstratplan-docs

Ground Rules for Effective Teams, 4th edition, Roger Schwarz
• http://go.ncsu.edu/rules-effective-teams

Feedback directly for us?
http://go.ncsu.edu/itstratplan-poll3

Please DO complete the session survey

…and enjoy your journey
An Unexpected Journey: The Quest for a Campuswide IT Strategic Plan

EDUCAUSE Annual Conference
Sept. 30, 2014

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