IT Strategic Planning Update: Transform IT

Senate Meeting October 19, 2016



Institutional Goals

- Everything we do as an institution is related back to the primary goals set by President Schill:
 - Excellence in academics and research
 - Ensuring student access and success
 - Ensuring a positive and productive student experience
- IT plays a critical role in accomplishing all of these goals
 - see University of Oregon policy IV.06.04 (Computing Priorities: Research and Instructional)



Background

- IT strategic planning efforts began in 2015
 - How is IT helping/hindering our ability to accomplish our institutional goals?
 - http://provost.uoregon.edu/content/it-strategic-plan
- Initially included the engagement of two external consultants to inform our work
 - Baker Tilly: Risk Assessment
 - Moran Technology Consulting: Strategic Plan
- Established a steering committee and 3 work groups to make recommendations on priorities and governance
 - IT Investments
 - Governance
 - Leveraging Resources



Areas of Challenge

- Both Baker Tilly and Moran Consulting found similar themes during their work
 - The distribution of resources and responsibilities with no central coordination or governance puts the institution atrisk (e.g., information security and privacy, infrastructure), and results in redundancy of efforts and constrained resources not being well-utilized
- We cannot accomplish our goals as an institution if we do not address these challenges



Information Technology Vision

UO will strive to create a collaborative and secure IT environment that attracts and retains the best students, faculty and staff by providing a common foundation of anytime/anywhere technology access for all UO 'citizens' and that focuses on strategically funding targeted technology capabilities to support its learning and research goals.

To achieve this vision, the University of Oregon must:

- Ensure that a collaborative IT Governance Model is deployed that continually focuses on prioritizing, funding and driving community-valued IT services
- Recognize that having a secure and robust underlying technology infrastructure is critical to providing all other technology services
- Identify cross-campus core IT services that are more cost effectively provided in a centralized approach and use the potential savings to fund strategically targeted projects
- Mobilize collaborative cross-campus constituencies to identify and address common goals
- Streamline our administrative processes and systems to provide more seamless and automated service to all campus stakeholders
- Have consistent and strong executive support to ensure that the IT Strategic Plan is supported
- Excite students and faculty to leverage technology to improve learning and research outcomes





IT Investments

- A task force of the Steering Committee vetted the IT project ideas that had been solicited from campus as part of the Moran Technology Consulting engagement
- Resulted in \$3M recurring additional IT investments
 - Infrastructure
 - Security measures
 - Beginning steps on consolidation/coordination



IT Governance

Governance Committee

Advises the Provost on all matters relating to IT including:

- Creating, revising, maintaining, and implementing IT policies
- Prioritizing use of available resources
- Overseeing campus technology working groups

IT Directors Committee

Advises the CIO on IT operations and needs including:

- Coordinating activities to improve efficiency and avoid duplication
- Sharing best practices
- Collaborating on innovative ideas
- Leveraging the use of local and central resources and infrastructure



Leveraging Resources

- Developed guiding principles to help determine when/if it is appropriate for one unit to be the owner of a particular task or function:
 - Are strategic priorities for UO
 - Will result in opportunities for scale economies
 - Will result in a more efficient use of resources
 - Cut across multiple units and do not require specialized knowledge of a unit
 - Will result in faculty/staff/students receiving new or improved services/products
 - When consolidated, improve operations and mitigate risks
- Recommended a longer-term assessment process of all IT units/functions
 - UO engaged Harvey Blustain
 - Report posted for public comment



What we know:

- Information Services will be the central unit managing IT on campus
- Library will be designated as campus lead for academic technologies
- VPRI will house High Performance Computing
- We will start with schools/colleges and leave administrative units for a later phase
- It is important to keep IT staff in close proximity to those they are working with

What we don't know: A lot

 We will continue to increase our engagement with others on campus (both IT professionals and users) to determine how best to move forward

What we've done:

- Established several groups to help gather information, engage faculty/staff, advise on next steps
- Started conversations to draft a charter that clarifies how functions will be distributed across IS, the Library, central communications, and VPRI
- Launched a verification and assessment process (Blustain had only a limited engagement and could not learn everything)
 - Conducted a survey of the schools/colleges (completed by the IT and Finance Directors) –Who are the IT staff, what do they work on, who do they work with
- Started a series of town hall meetings



What we've learned:

- We have many talented, engaged IT professionals with expertise to draw upon for these efforts (comments and ideas have been tremendously valuable)
- We need to move forward with intentionality and continued momentum to address the Board of Trustee's and Administration's concerns around risk, redundancies, and hampered ability to accomplish larger institutional goals
- We must set the stage for a new CIO who will have numerous challenges and strategic planning objectives to address but cannot wait for the CIO to arrive to get started
- We need to ensure that we are establishing career opportunities for IT professionals and not hindering their development or ability to work on meaningful projects

- What we need to address (not an exhaustive list):
 - How do we ensure we are breaking down silos and not creating them (e.g., not artificially establishing administrative v. academic developer teams)
 - How do we ensure service levels do not drop but either stay constant or improve across units
 - How do we set processes/structures that prioritize projects in light of high demand (e.g., CAS-IT's scoring rubric)
 - How do we define where academic technology ends and general IT administration begins
 - How do we establish success metrics



• What's Next:

- Appoint a project management FTE to facility the process, timeline, and communications
- Post more updates and questions for feedback to the provost's website
- Ensure frequent, clear communication and avenues to gather ideas/suggestions
 - Nov and Dec will include numerous town hall meetings as well as one-on-one or small group meetings with all IT staff in the academic units and the associate CIOs (based on areas of expertise)
- Continue reviewing all comments/ideas/proposals and determine how to incorporate them into the process or decision-making
- Continue with the small team (Patrick Chinn, Noreen Hogan, Steve Menken, Helen Chu, Sara Brownmiller) empowered to craft the charter detailing distribution of activities, informed by comments/thoughts from around campus, for provost approval
- What's missing?

