
UW Oshkosh IT Plan January, 2016

The UW Oshkosh IT Plan does not have any IT projects exceeding \$1,000,000 or projects that are vital to the functions of the institution such that failure to complete the project on time or on budget would prevent the campus from running any of its enterprise-wide systems or fulfilling any of its essential missions of instruction, research, extended training or public service for 10 days.

How the plan was developed

The FY16 IT Strategic Plan was drafted at an offsite retreat of IT leadership. A SWOT analysis was conducted from which strategies were derived. The plan was also heavily influenced by a current study of IT campus organization by a team of people from across campus, charged by the Chancellor to make recommendations for the optimization of campus IT organization. Fourteen recommendations were developed and vetted around campus and through shared governance. The recommendations are now under consideration by the Chancellor.

Plan principles

The following key performance indicators are used to guide ongoing planning and execution:

1. Strategic Alignment
2. Customer Experience
3. Operational Efficiency
4. Risk Management

How the plan is measured

Objectives of the strategic plan are measured through the ADDIE process of Assessment, Design, Development, Implementation, Evaluation. This includes the use of standardized instruments where available, predetermined performance metrics and data analysis.

How the plan is tied to the University's strategic objectives

IT objectives are aligned with institutional objectives through the use of portfolio management. All IT investments are assessed for cost, benefit, risk, and alignment with university objectives. The campus is in the process of revising and issuing a new strategic plan. This IT Plan will be updated when the university strategic plan is finalized.

Format and accessibility of the IT plan

The updated IT Plan will be vetted through the IT governance process and published on the IT web site.

How critical objectives are identified

Critical objectives are identified by the CIO and technology leaders. Objectives are informed by assessments and Key Performance Indicators (KPIs) and through consultation with the IT Executive Council and constituent input.

IT Governance

A new governance framework has been implemented based on the COBIT 5 standard with a defined structure, process, and supporting policies. Strategic planning and execution operate within the governance framework.

Major Themes of the IT Plan

The major themes of the IT Plan are:

- Supporting enrollment management
- Campus organization optimization

Projects in progress

Student Success Collaborative

Implement and support the Student Success Collaborative system from EAB in support of enrollment management to improve student retention, progression, and graduation.

Timeframe: Spring/Fall 2016

Cost: <\$300,000 upfront costs; ongoing time & effort.

Customer Relationship Management (CRM)

Acquire and deploy additional CRM functionality targeted at undergraduate enrollment management.

Timeframe: Summer 2016

Cost: Estimated <\$300,000 upfront costs; ongoing time & effort.

Web Content Management System (CMS)

Acquire and deploy campus-wide web CMS that integrates with the CRM and SSC in support of enrollment management. Begin migration of existing site content.

Timeframe: Summer 2016

Cost: TBD dependent on RFP outcome.

Campus IT Organization Optimization

In August 2015 the Chancellor charged the CIO and a team of constituents from across campus functional areas and roles with the development of recommendations to optimize the organization of distributed IT. The recommendations were to be based on the work performed by a previous study group that researched best practices and laid out a range of models and their pro's and con's. The recommendations were developed, vetted across campus, and submitted to the Chancellor December 5. After performing his own due diligence regarding the recommendations, **the Chancellor announced his decisions at end of January**. In general, the recommendations and decisions are moving the campus toward more centralized control of IT investments, assets, and policies to improve the KPIs of strategic alignment, constituent experience, operational efficiency, and risk management. Some of the decisions were high-level changes to the CIO role and authority, which, although impactful, were simple to implement. Many of the decisions generated new projects or endorsed projects already underway within the central IT division, extending them to the rest of campus. Projects resulting from these recommendations and decisions that will occupy IT time and effort in FY16 to implement are described below.

Timeframe: Spring/Fall 2016

Cost: Operational Time & Effort.

Establish a mechanism for ensuring innovation takes place. The portfolio management framework under development will be modified to ensure capacity for innovation. A balanced scorecard for IT will incorporate innovation as a performance metric.

Establish appropriate prioritization mechanisms to ensure a balance between unit and institutional priorities. The portfolio management framework under development will be modified to ensure unit priorities are in balance with institutional priorities. A balanced scorecard for IT will address strategic alignment and the inclusion of an appropriate balance of unit priorities as a performance metric.

Develop a centralized, independent, and predictable budgeting mechanism. Changes to the distributed IT organizations will necessitate changes in the budget model, which will be developed in the coming months.

Establish Service Level Agreements (SLAs) outlining service levels and funding required. Distributed units which formerly directed their own IT staff will now rely on central IT support, which concerns them. SLAs have been piloted and will be further developed to outline expectations and responsibilities.

Establish a stakeholder group with broad representation from directors and students and a process to periodically evaluate performance. Advisory groups exist to give input into IT operations but are largely populated by IT power users. A new or revised stakeholder advisory structure will be developed to provide a broader voice into IT operations and performance across campus.

Extend IT portfolio management to incorporate unit missions and innovation as priorities and to achieve more robust project management and communication practices. As noted above, portfolio metrics will be established to incorporate unit missions and innovation as priorities to be maintained. Project management training for staff is underway, with several staff members pursuing certifications. We will also pursue establishment of a PMO to oversee the portfolio, projects, and communication practices.

Centralize all IT infrastructure services with appropriate funding and life cycle management. For various historical reasons, divisions outside of central IT have invested in and implemented their own technology infrastructures. In some cases, this has enabled experimentation and innovation that have benefited the university, but it has also led to unsustainable or redundant systems and lack of insight into IT spend and risk. Centralizing support, funding, and authority over these systems and the personnel supporting them will reduce duplication of effort and expenditure and better manage risk.

Standardize equipment lifecycle management. The central IT division is developing a lifecycle management model for centrally managed equipment. The model will forecast equipment replacement schedules and funding required and allow for easy scenario testing to smooth and align replacement schedules with funding and staffing availability. This model will be extended to all campus technology that were formerly funded by departments, allowing us to leverage volume discounts, more efficiently manage replacement cycles, and create a more consistent constituent experience.

Centralize enterprise information systems and integrations. For various historical reasons, divisions outside of central IT have invested in software that integrates into the information system with little or in some cases no central oversight. Some units have invested in permanent staffing to support these integrations where others have not. While this evolution has enabled experimentation and innovation that have benefited the university, it has also led to unsustainable systems or insufficient oversight of information management. Centralizing support, funding, and authority over these systems and the personnel supporting them will better manage risk.

Regularly evaluate existing or proposed systems to reduce redundancy and risk. As a result of the historically distributed nature of IT authority, IT systems have proliferated under the radar of central

oversight. In some cases, those systems are a valuable contribution to university mission and operations; in some cases, they are untimely found to pose operational or information-security risk or unnecessary redundancy. A thorough upfront and regularly recurring audit for systems will uncover those problems and allow for resolution.

Allocate space for Technology Centers at locations throughout campus to assist faculty, staff and students with IT issues. This project is already underway converting existing IT computing lab space as available. The Technology Centers will continue to provide computing lab space, but will be branded more obviously and consistently and staffed with lab “consultants” (students and professional staff) who have more advanced support training than previously. In addition to providing basic technical support for faculty, staff, and students, the lab consultants will also provide technology and information literacy tutoring for students in support of their academic and future career success.