

BACKGROUND:

The people of ITS are specifically charged to provide technology services in a secure, compliant, stable and sustainable manner that enable other university units to achieve successes that allow the university to meet its strategic goals. As such, we provide the underlying technology infrastructure, tools, processes and support required for academic, research, outreach and administrative success.

In supporting all constituents of the University of Idaho, ITS has a positive impact on all goals of the UI Strategic Plan. It is critical that we understand our alignment to the UI Strategic Plan so that we can ensure that the actions we undertake support the priorities of the university. The table below summarizes our impact on the UI plan.

University Strategic Goal ¹	Focus for ITS? (Y or N)	Unit’s high priority activities to support and advance this goal	Corresponding measure of success (metrics and / or milestones)
Innovate (especially terminal degrees)	Y	Storage, cyberinfrastructure and research computing plans	Plans in place to support increased research growth in areas of big data and connectivity to research partners; prepare the technology infrastructure, support personnel and process to provide the ability to scale quickly and efficiently as research grows.
Engage (especially go-on rates)	N		Prepare the technology infrastructure, support personnel and processes to achieve projects in support of engagement goals
Transform (especially enrollment and retention)	Y	System implementations, user experience improvements, twice yearly “Vandal Overnight” events	Completed projects that prepare the technology infrastructure, support personnel and processes to provide the ability to scale quickly and efficiently as enrollment grows.
Cultivate (especially work environment and inclusivity)	Y	Improved internal communications, internal service management improvements	Additional training and career path opportunities for employees; implemented reorganization focused on customer support

¹Detailed information on the UI Strategic Plan can be found at <http://www.uidaho.edu/provost/strategic-plan>.

The ITS Cascaded Plan is a framework for our long-term prioritized tactical support of the UI Strategic Plan. The core of our plan runs in a parallel timeframe to that of the UI Strategic plan – 2016 through 2025. Our mission, vision, values and philosophies are core and will likely not be changed each year but it is necessary to update the ITS Cascaded Plan to build upon our accomplishments, adapt any changes to UI strategic goals and ensure that the cascaded plans of other UI units are supported in the best interests of UI. The operational work we do every day is critical to UI’s success and should never be minimized. In addition to that work the initiatives listed in the ITS Cascaded Plan help move ITS and UI forward while also ensuring that ITS staff, organization and technology are prepared to accommodate UI’s growth.

The initiatives in our plan represent a mixture of technical planning and implementation plus important growth in ITS' people, processes and procedures. We focus on four key areas when planning:

1. **Adapt** - Build stability, scalability and flexibility in the technology infrastructure, improve the experience of our end users [added in FY 2018] and improve efficiencies and effectiveness in policies, procedures and business processes to accommodate initiatives in the UI Strategic Plan and unit-level cascaded plans.
2. **Collaborate** - Improve university communication and collaboration amongst constituents.
3. **Secure** - Improve the security posture of the University through technology implementation, policy modernization, process improvement, and education.
4. **Energize** - Develop an ITS organization that best meets the needs of the University, provides opportunities for ITS employees to grow and to make ITS an effective and efficient support organization for the entire University.

When determining the initiatives to undertake as part of our cascaded plan, it is important to keep in mind the fundamental philosophies of ITS:

- Embracing a cloud-centric approach to technology decisions that speeds delivery time but maintains stability, usability and security
- Developing and providing a baseline of support for all and enhanced support for strategic priorities
- Putting more ITS personnel closer to customers to better understand the business and provide faster, higher level support
- Focusing security efforts based on data classifications to address highest risk situations first
- Centralizing resources and standardizing *where it makes sense* for the University
- Communicating effectively internally and externally
- Making ITS an outstanding place to work
- Recognizing that new resources will come with increases in enrollment
- Reviewing ITS service offerings qualitatively and quantitatively

More background on the ITS Cascaded Plan as well as a recap of our success in FY 2017 will be documented on the improved and renewed ITS website in March 2018. This is a good resource to review our mission, vision, philosophies and why we have decided to undertake the initiatives in our plan.

FY 2018 SUMMARY:

The University of Idaho is in a period of positive change, and ITS is well positioned to assist in bringing it about. FY 2018 (and in some cases continuing into FY 2019) represent initiatives that have carried over from the FY 2017 iteration of the plan. The FY 2017 plan was ambitious and included a major restructuring of ITS that was successful but time consuming and not without significant challenges. This did not leave time to tackle certain initiatives that have carried over to FY 2018 including the development of a full ITS cost model for future planning and work to better document the future of research computing at UI. Some initiatives from the FY 2017 plan were not completed and did not carry over to FY 2018. Work on those initiatives, an example of which is the Rebalancing Technology Investments initiative, was determined to be of a lower priority based on the information available and will not be a focus for FY 2018. There are also a number of new initiatives for FY 2018 including leading or supporting a number of system implementations and upgrades in support of retention and basic operations, developing long term strategies around storage and compliance and improving institutional policies, procedures and practices around technology.

A primary focus for FY 2018 will be determining, through customer input, research and system changes, how best to improve the overall technology experience for faculty, students and staff. With over 400 software applications in use at UI, increased security requirements and multiple (and often duplicative) supported and unsupported offerings for storage, collaboration and communication, it has become increasingly difficult for our customers to navigate our technology environment. To that end, we are launching an initiative called “User Experience Improvement” to study our current environment and develop technical and process improvements to increase productivity and make it easier to use the technology assets of the institution.

We must also continue to develop the best possible work environment for the people of ITS. A review of the “Great Colleges to Work For” survey results from Spring 2017 showed areas for us to review, and we will continue to act on that data, but one key area identified last year was improved communication both internal to ITS and with our customers. This year we are combining these initiatives into a single initiative that will build on things done last year like the implementation of Microsoft Teams, all-hands meetings and other steps. Additionally, we will complete the implementation of the TeamDynamix work management system and a first phase in developing the right metrics by which to measure the success of the services we provide.

Last year’s initiatives laid the groundwork for this year and beyond. The initiatives outlined for FY 2018 and beyond are both achievable and critical to the success of UI. We have to be adaptable and flexible as necessary in meeting the needs of our customers but our focus on the FY 2018 initiatives will continue to help UI achieve its strategic goals. The only way that we will be successful and help UI succeed is that we all actively engage in the initiatives detailed in this plan while continuing to accomplish the high level of operational work on which our customers depend. Volunteer your knowledge and expertise, be active participants, offer suggestions and speak up so that we keep the best interests of our customers and UI in mind at all times. Doing so will not only provide excellent opportunities for the people of ITS to learn, grow and engage but will also help UI accomplish its goals and continue to realize its critically important mission as a land grant University – noble causes indeed.

Initiatives for FY 2018		
Initiative/ITS Lead	Description	Goal
Multi-factor Authentication (Parks/J. Cox)	As a result of the Security Plan initiative from the FY 2017 ITS Cascaded Plan, implement DUO multi-factor authentication for faculty, staff and students. This initiative provides a foundation for securely rolling out new user functionality and is a requirement of the 2017 executive order on cybersecurity.	Implementation complete by January 31, 2018
APM/FSH Phase 1 (Ewart/George)	Based on the APM/FSH Updates initiative from the FY 2017 ITS Cascaded Plan, complete changes to priority policies in the Administrative Procedures Manual and Faculty-Staff Handbook.	Complete Phase 1 by June 30, 2018
Integration Strategy (Borchers)	Develop and implement a strategy, processes and procedures for how to best integrate applications identified in the Application Portfolio from the FY 2017 ITS Cascaded Plan.	Complete by June 30, 2018
Technology Forecast (Ewart/George)	Develop a five-year roadmap for necessary technology-related expenditures and optimal technology budgeting to allow for improved institutional planning and budget decision making.	Plan by April 30, 2018
Service Measurement Strategy Phase 1 (B. Cox)	Develop and implement a service catalog for ITS and determine how the success of the services in the Customer Experience and Engagement unit will be measured and evaluated. This initiative will be done in correlation with the Work Management System Implementation initiative.	Implement by June 30, 2018
ITS Communication Improvements (B. Cox)	Building upon the Internal Communication initiative from the FY 2017 ITS Cascaded Plan (which included the implementation of Microsoft Teams, rollout of “Ask the VP” and others), improve the current structure and implement tools to provide better communication within ITS, with other technical resources across UI and with the customers of ITS.	Plan and implement by June 30, 2018
Work Management System Implementation (B. Cox, J. Cox)	Implement the cloud-based TeamDynamix work management system to track ITS work efforts that integrates with portfolio, project, and resource management and allows for better informed ITS investment decisions. Including development of ITS service catalog and associated success measures. Preferred prerequisite to the Cascaded Plan initiative named “Strategic Coordination of IT Initiatives”.	Implementation by March 14, 2018
Storage Strategy Phase 1 (Lien)	Develop a strategy and recommend initial investments for a storage strategy that meets the varied storage needs of UI while embracing, where currently possible from functional and financial perspectives, a cloud-centric approach.	Complete by June 30, 2018
CRM Advance Implementation (Borchers)	Assist University Advancement in the secure, integrated implementation of the cloud-based Ellucian CRM Advance product to allow for improved communication with alumni, donors and friends of UI while facilitating increased donations and constituent engagement.	Implementation by April 19, 2018

Initiatives Spanning FY 2018 and FY 2019		
Initiative/ITS Lead	Description	Goal
Disaster Recovery / Business Continuity (Lien)	Develop and implement both disaster recovery and business continuity strategies within available resources.	Implementation by June 30, 2019
FISMA Compliance (Parks)	Develop and implement a plan to ensure institutional compliance with the Federal Information Security Modernization Act. Successful implementation will provide compliance with many federal granting agencies, directly supporting Goal 1 of the UI Strategic Plan.	Plan by June 30, 2018 and implementation by June 30, 2019
Critical Security Controls Implementation (Parks)	Building upon the Security Plan initiative from the FY 2017 ITS Cascaded Plan and in support of following the Governor's Cybersecurity Executive Order, develop and implement UI's solutions for the first five Center for Internet Security Critical Security Controls to reduce risk for our environment and improve compliance with regulations and best practices.	Plan by February 28, 2018 with phased implementation to follow
Strategic Coordination of IT Initiatives (J. Cox)	Develop robust structures, processes and procedures for the coordination and prioritization of institutional technology procurement and implementation decisions in a way that are not only secure and sustainable but that best meet the goals of the UI Strategic Plan.	Plan by April 30, 2018 and implement August 1, 2018
User Experience Improvement (Ewart)	Determine and implement improvements to the way users access and utilize ITS-supported products through research and customer testimonials collected by a group of volunteers from across ITS.	Plan by May 30, 2018 with ongoing implementation post planning.
Banner 9 Upgrade (Borchers)	Complete the upgrade of the administrative components of the Banner ERP system to the version known as Banner 9. Upgrade of VandalWeb in 2019.	Admin upgrade by December 1, 2018, VandalWeb in 2019
Workplace Enhancement (Holthaus)	Implement a number of improvements to the workplaces of ITS employees, including but not limited to furniture purchases, equipment upgrades, new software and various levels of remodeling to spaces including the Admin Data Center. This in support of the ITS "Energize" concept as well as Goal 4 of the UI Strategic Plan.	Complete by August 2018
Research Computing Strategy (Ewart)	Develop a plan for the long-term support of research computing that will support proposal development, wide-ranging research activities and the long-term archival and curation of research data. This strategy is foundational for the Cyberinfrastructure Plan Phase 2 initiative.	Begin project in FY18
VandalStar Implementation (Borchers)	Assist Strategic Enrollment Management in the secure, integrated implementation of the Starfish by Hobsons' student retention and engagement system to improve student retention through early warning and increased touchpoints with students.	Initial phase by March 2018, implement by October 2018

Initiatives for FY 2019 and Beyond		
Initiative/ITS Lead	Description	Goal
Cloud Application Security (Parks)	Develop a plan to improve coordination and implementation of security within and between cloud-based applications.	Plan by June 30, 2019
APM/FSH Phase 2 (Ewart/George)	Based on the APM/FSH Updates initiative from the FY 2017 ITS Cascaded Plan, complete changes to top priority policies in the Administrative Procedures Manual and the Faculty-Staff Handbook.	Complete Phase 1 by June 30, 2018
ERP Implementation (Borchers)	Based on the ERP Strategy initiative from the FY 2017 ITS Cascaded Plan, UI will need to make significant changes to its Enterprise Resource Planning (ERP) system – Ellucian Banner – in the future based on Ellucian’s support strategy for the current on-premise system, cost, market options or decisions made by the State of Idaho around higher education. This is one of the largest single efforts a higher education institution can undertake, thus planning must begin in FY 2019.	TBD
Storage Strategy Phase 2 (Lien)	Based on the Storage Strategy Phase 1 initiative from the FY 2018 ITS Cascaded Plan, continue the implementation of the improvements in UI storage capabilities.	Begin project by end of FY19
Collaboration Tools (B. Cox, Lien)	Develop a plan to provide and communicate a comprehensive set of collaboration tools and develop a process for evaluating new tools.	Implement in FY19
Cyberinfrastructure Plan Phase 2 (Lien)	Build upon the Cyberinfrastructure Plan Phase 1 initiative and work in the Research Computing Strategy initiative to further improve UI’s ability to compete for research grants.	Complete project in FY19
UI Communication Tools Strategy (Lien)	In support of the UCM communication strategy for UI, plan and implement a comprehensive technology strategy for enabling communications between UI and key internal and external constituents.	Begin project in FY19

