ITS CASCADED PLAN FY 2022

IMPROVING SUPPORT IN CHANGING TIMES
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University of Idaho

BACKGROUND

- In 2016 the University of Idaho completed an inclusive strategic planning effort that has provided a guide and measurements for our success.

- The plan spans from 2016 – 2025, divided into 3 three-year sections. Every three years there are waypoints and metrics against which to measure institutional progress.

- Institutional units were tasked with creating individual "Cascaded Plans" that support the achievement of institutional goals.

- Information Technology Services (ITS) has updated its cascaded plan each year, with the FY 2022 update building on past plans and called "Improving Support in Changing Times."

FY 2021 ITS SUCCESSES

These examples of successes of FY 2021 reflect the statewide, enterprise-wide focus of ITS:

- Extensive support for customers in response to pandemic-driven changes, including infrastructure enhancements to support work-from-home, hybrid education and remote learning

- Classroom technology upgrades and the addition of 50 new hybrid classrooms

- Significant progress on the $994k GEER Grant - new lecture capture and Adobe software for faculty, over 200 new laptops deployed, 21 additional classrooms statewide and 17 new lecture studios

- Completion of the North Idaho Broadband grant to bring enhanced access to extension centers in Boundary, Bonner and Kootenai counties as well as the Sandpoint Organic Agriculture Center

- Successful move of the Banner ERP software to the cloud in Oracle Cloud Infrastructure

CURRENT STATE - UNIVERSITY

- University president Scott Green has solidified the leadership team

- The university successfully responded to the COVID-19 pandemic and is ready to focus on strategic growth.

- Operational budget deficits have mostly been addressed and the new Vandal Hybrid Budget Model is in place. Other university workgroups have shown significant progress.

- The Idaho State Board of Education continues steps towards efficiencies in Idaho's higher education environment including the implementation of multiple new software systems.

CURRENT STATE - IT

The pandemic served to underscore the value of IT across the state but did cause necessary delays in pursuing the IT Shared Services efforts to improve IT service delivery across the institution. The realities of the institution's budget situation has seen a significant reduction in the number of IT staff while needs and expectations for technology have increased.

Continued progress in coordinating and prioritizing IT efforts across the institution must continue through the realization of the benefits of a successful IT Shared Services initiative.

IT and ITS

- Roughly 50-50 split in tech employees between ITS and units/colleges.

- Budget reductions in the last two years have seen more than 20 technology positions eliminated.

- ITS has many statewide responsibilities and collaborates with technology personnel across the state.

IT Decisions

- Institutional prioritization of IT initiatives is impacted by reactions to budget reductions and new State Board of Education priorities.

- Decisions often based on budget available to a specific unit but have institution-wide impacts.

- Many duplicative solutions and lack of depth in support have resulted from past and current decision-making processes.

Budgets

- Continued adjustments to ITS funding reductions and new metrics of the Vandal Hybrid Budget Model.

- Infusion of pandemic grant funding resulted in improved capabilities but increased support requirements and replacement considerations.

- "Rich versus poor" departments create technology gaps as do technology purchases with on-going obligations being made through one-time funds.

Coordination

- Extremely complex technology, security and compliance environments.

- ITS often involved late, slowing down or stopping projects due to resource availability or institutional risk.

- Communication between ITS and unit technology teams continues to improve.

ALIGNMENT OF INSTITUTIONAL GOALS AND PRIORITIES

U of I Strategic Plan Goals

Goal 1: Innovate – scholarly and creative work with impact

Goal 2: Engage – outreach that inspires innovation and culture

Goal 3: Transform – educational experiences that improve lives

Goal 4: Cultivate - a valued and diverse community

U of I Accreditation Core Themes

Core Theme One – Scholarly and creative work with impact

Core Theme Two – Outreach that inspires innovation and culture

Core Theme Three – Increase our educational impact

2021 – 2022 Institutional Priorities

1. Supporting student success

2. Ensuring excellence across our research, scholarship and creative activity

3. Telling the story of the University of Idaho

4. Financial stability and investments in priorities

THE ROLE OF ITS IN U OF I'S STRATEGY

ITS is a <u>strategic</u> service organization, specifically charged to provide services that enable other university units to achieve successes that allow the university to meet its strategic goals.

Working in a service organization, <u>each and every ITS employee</u> has an opportunity and a responsibility to help students to have a positive and life-changing experience at U of I, help U of I employees to be productive, and help the university grow and prosper.

To achieve U of I's mission, vision and goals, the ITS Cascaded Plan must:

- align with and support the achievement of stated goals

- have a basis in customer needs as well as known challenges

- provide flexibility to accommodate innovation, institutional change and industry change

- build scalable capacity and organizational and process flexibility in addressing institutional needs with new or improved services

SUCCESSFUL PLANNING

KEYS ARE UNDERSTANDING AND AGREEMENT ON:

Why are we doing this?

What do we need to do?

How will we achieve our goals?
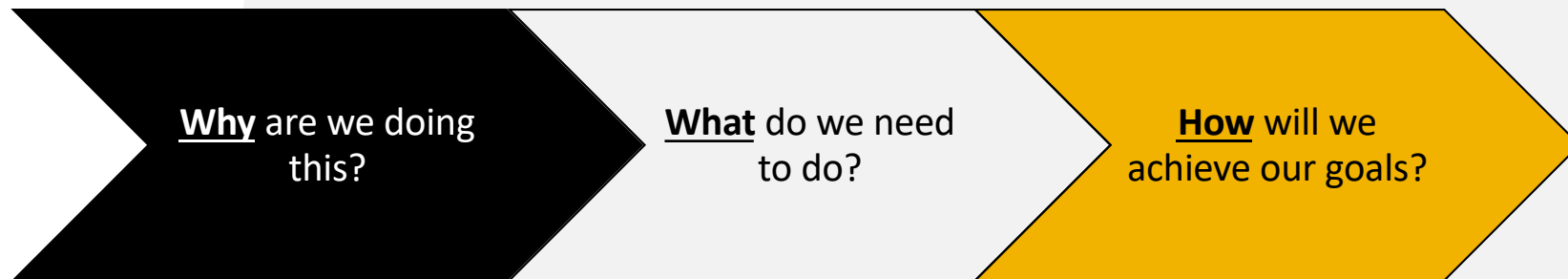
WHY PLAN?

We need a plan because:

- Technology can be an enabling factor to institutional progress. Changes are needed to support innovation, new capabilities and growth.

- Technology can also be a limiting factor to institutional progress. Changes can help mitigate limitations.

- Change can be disruptive. Partnerships across the University can help minimize disruption and maximize value.

- Investments needs to be targeted to make the best possible use of University resources.

- Communication is critical.

In support of the UI Mission:

The University of Idaho will shape the future through innovative thinking, community engagement and transformative education.

The mission of ITS is to :

Provide technology leadership, expertise and services in support of UI by offering excellent service to its customers and ensuring an institutional perspective on technology solutions, information security and continuous improvement through technology.

In support of the UI Vision:

The University of Idaho will expand the institution's intellectual and economic impact and make higher education relevant and accessible to qualified students of all backgrounds.

The vision of ITS is to :

Be the partner of choice for technology support and for enabling advancement and innovation through technology across the institution.

WHAT IS THE BASIS FOR DECISIONS?

Why   What   How

Our decisions will be based on fundamental philosophies:

- Move complete services to the cloud when possible

- Provide a baseline of support for all and enhanced support for strategic priorities

- Continue integrating technology personnel with their customers *where it makes sense*

- Focus security efforts based on data classifications

- Centralize resources, processes and standards *where it makes sense*

- Communicate effectively internally and externally

- Make U of I an outstanding place for technology professionals to work

- Review technology service offerings qualitatively and quantitatively with input from customers
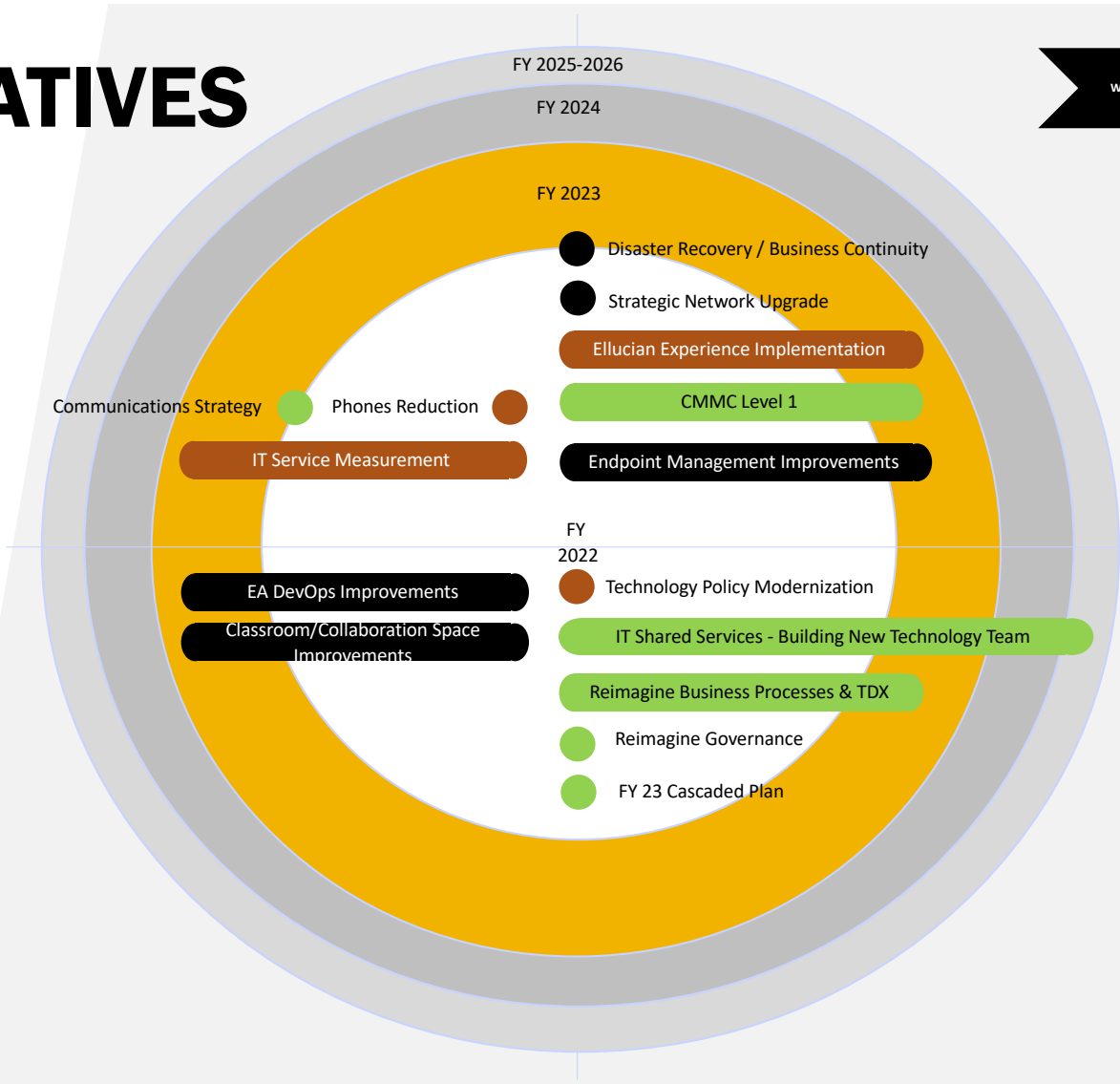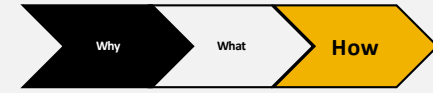
FOCUS FOR FY 2022

The focus of the FY 2022 cascaded plan will be on near term initiatives to improve operations and set foundations for the future.

A longer-term view will be the focus of the to-be-developed FY 2023 cascaded plan. The FY 2023 plan will be developed collaboratively with input from across the institution and based upon the technology and organizational changes needed to support post-COVID realities, new budget models, increasing compliance requirements, increasing security risks, increasing expectations for technology and statewide desires for more collaboration and efficiency across higher education. The FY 2023 plan needs to be developed after organizational changes are completed as part of the "IT Shared Services - Building New Technology Team" initiative in the FY 2022 plan.

The list of initiatives in the FY 2022 cascaded plan is not intended to be inclusive or represent all all technology-oriented activities.

INITIATIVES

FY 2025-2026

FY 2024

FY 2023

- ⬤ Disaster Recovery / Business Continuity
- ⬤ Strategic Network Upgrade
- Ellucian Experience Implementation
- CMMC Level 1
- Endpoint Management Improvements

Communications Strategy ⬤ Phones Reduction ⬤

IT Service Measurement

FY 2022

EA DevOps Improvements

Classroom/Collaboration Space Improvements

- ⬤ Technology Policy Modernization
- IT Shared Services - Building New Technology Team
- Reimagine Business Processes & TDX
- ⬤ Reimagine Governance
- ⬤ FY 23 Cascaded Plan

Why · What · **How** · I

ITS Cascaded Plan
FY 2022 Overview

⬤ Operational
⬤ Tactical
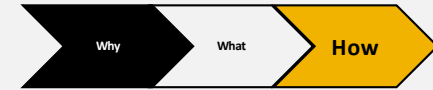⬤ Strategic

Please Note: not intended to represent all activities

Please Note: major infrastructure replacement cycle projects are planned and documented on the ITS Technology Forecast.
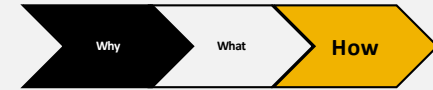
INITIATIVES

Why → What → How

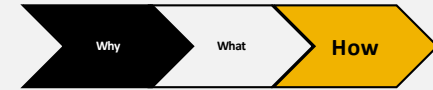| Initiative	Initiative Lead(s)	Student Success	Research	Telling Our Story	Financial Success
Phones Reduction (FY 2022) – To prepare the university for increased use of new technology and to align the ITS budget with these changes, this initiative will eliminate unneeded telephone lines and transition use, where practical, to alternative modern communication mechanisms.	Kearney				X
Strategic Network Upgrades(FY 2022) – To provide the most stable, robust and secure networking experience, multiple upgrades to statewide wired and wireless network equipment and infrastructure will be accomplished.	Jemes	X	X		X
Technology Policy Modernization (FY 2022) – To accomplish key security, compliance, operations and efficiency goals, updates will be made to the University's Administrative Procedures Manual (APM) policies to reflect current and projected future technology and technology compliance needs.	Amos	X	X	X	X
Reimagine Governance (FY 2022) – To accommodate new and sustained statewide and institutional requirements for technology, the IT Governance and Prioritization process needs to be reviewed, collaboratively updated and communicated to university constituents	Ewart / Armitage	X	X		X

INITIATIVES

Initiative (Year)	Initiative Lead(s)	Student Success	Research	Telling Our Story	Financial Success
FY 23 Cascaded Plan (FY 2022) – To accommodate the many changes the university and technology support are undergoing, a collaborative cascaded planning process for FY 23 will result in a new format and initiatives for technology at the university.	Ewart	X	X	X	X
Communications Strategy (FY 2022 - 2023) – To best communicate IT needs, challenges and information to many different constituent groups, this initiative will develop a communication strategy that reflects the importance of the information and the available resources through which to communicate.	Prescott			X	X
IT Service Measurement (FY 2022 - 2023) – To provide improved customer service and to deliver required information on the metrics in the Vandal Hybrid Budget Model, this initiative will define and implement the new metrics and develop the necessary resources to effectively communicate the ongoing status of those metrics.	Ewart			X	X
Enterprise Applications DevOps Improvements (FY 2022 - 2023) - To improve efficiency, security, communication and customer service, the Enterprise Applications team will implement operational changes, new systems and new processes around the development and administration of applications and integrations.	Armitage	X			X

INITIATIVES

| Initiative (Year)	Initiative Lead(s)	Student Success	Research	Telling Our Story	Financial Success
Disaster Recovery / Business Continuity (FY 2022 and FY 2023) – To minimize risks associated with extended downtime of the Banner ERP system and specific related systems, this initiative will develop enhanced capabilities and documented plans for disaster recovery and business continuity.	Lien / Woods	X	X		X
Ellucian Experience Implementation (FY 2022 and FY 2023) – To provide the best possible technology experience for students (first) and employees and to support new communication strategies, this initiative will develop a phased plan for and implement the Ellucian Experience portal.	Armitage	X		X	
CMMC Level 1 (FY 2022 and FY 2023) – To improve the security posture of the university and to achieve compliance with federal requirements, this collaborative initiative with ORED will implement policy, process and technology changes to support achieving Cybersecurity Maturity Model Certification Level 1.	Parks		X		X
Endpoint Management Improvements (FY 2022 and FY 2023) – To improve security and support for endpoints, this initiative will implement a number of technology and policy changes including but not limited to implementing always-on VPN, LAPS, USB device use limitations, and a replacement for Safeguard encryption.	Lien	X	X		X

INITIATIVES

Initiative (Year)	Initiative Lead	Student Success	Research	Telling Our Story	Financial Success
Reimagine Business Processes and TDX (FY 2022 – FY 2023) – To improve customer service, efficiency and information tracking, this initiative will review and implement improved business processes in the TeamDynamix work management system.	Amos	X	X		X
IT Shared Services - Building New Technology Team (FY 2022 and beyond) – To realize the benefits of previous IT Best Use and IT Shared Services initiatives, this initiative will focus on building a new team, a new culture of collaboration and shared processes for technology support personnel across the university. Delayed due to the pandemic response, a detailed plan is forthcoming early in FY 2022.	Ewart	X	X	X	X
Classroom and Collaboration Space Improvements (FY 2022 – FY 2023) – To build on the successes during the pandemic and to better accommodate hybrid work and education environments, this initiative will continue the technology enhancements in collaboration spaces, conference rooms and classrooms.	Hall	X	X		

OTHER INITIATIVES

Why | What | How
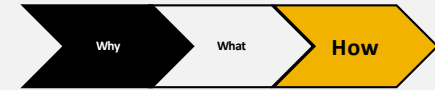
In addition to operational work, as time and resources allow other statewide initiatives may begin:

- Telephone system and related communications strategy

- Student printing and secure printing strategies

- Multiple security risk mitigation projects

- VandalCard use and support long-term strategy

- Statewide efficiency efforts with other Idaho higher education institutions

- Possible implementation of the Canvas learning management system (depending on institutional decisions)

- Possible implementation of new technologies in support of marketing and communications (depending on institutional decisions)

University of Idaho

QUESTIONS CAN BE SENT TO DAN EWART, VP FOR IT AND CIO

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