IT STEERING GROUPS EXPLAINED: 7 TIPS FOR IT STEERING GROUPS

IT Steering Groups (ISG's) are a vital part of an organization typically tasked with reviewing, prioritizing, and monitoring major IT projects from a cross-functional viewpoint. IT Steering Groups are concerned with alignment between the organization and IT strategy and ownership of strategic IT decisions. In this post, we'll look at 7 best practices for IT Steering Groups.

1. Know your reason for establishing IT an IT Steering Group (ISG)

We can all agree that ISG's are an asset to an organization. However not all organizations establish governance committees for the same reasons. Generally, an ISG is leveraged as one of many processes to ensure the IT department/group delivers the services and outcomes that enable the larger organization to accomplish its goals.

Most of the time however, ISG's are established to address something specific within the organization. Sometimes, this is a reactionary measure, such as when an organization's IT projects are continually over budget and overdue. Other times, the ISG's are established as part of a larger organizational change effort.

Before you get started on chartering your ISG, be sure you have a clear understanding of why it is being created. What problems do you want to solve? What do you hope this group will accomplish? Do you just need it to approve the budget and IT strategic plan? Be sure to document these reasons

in the ISG charter.

2. Establish clear functions for your IT Steering Group

The only thing worse than no governance is too much governance. There are reasons IT organizations have Directors, managers and CIO's. Your ISG should not remove the decision-making ability from these individuals. Rather, it should guide the big picture direction of the organization and can in some circumstances even ratify the decision of IT leadership. I've seen several small organizations establish an ISG only to become frustrated with the added bureaucracy. Most of the time this is because the IT committee tried to accomplish too much too soon. Below are a few examples of what decisions IT Governance bodies should make and what decisions should be left to the managers.

ISG Decision	IT Management Decision
Approval of an IT Strategic Plan	Decision between Dell, HP, and Lenovo (or other) endpoints
Review and approve the IT Budget	Assignment of project team members
Approval of IT policies	Technical architecture
Set project priorities based on organizational needs	Storage technology selection
Approve IT Headcount	Recruit, review and hire job candidates
Approve the security plan / framework	Determine what security controls should be included a security policy

3. Kickoff the IT Steering Group with a Formal Charter

There is no one right way to write a steering group charter. A quick internet search will reveal several examples that can be used as a template. As a general guideline, I like to have at least the following sections:

- Purpose Statement
- Scope - Establishes what the ISG is responsible for
- Membership – Include any mandatory members, as well as any ex-officio (non-voting) members
- Leadership – Chair, Assistant Chair, etc.
- Expectations of Steering Group Members
- Decision Making – How will decisions of the ISG be made and documented? Will it be a vote? Do you require a majority vote? Is there a required quorum for meetings?

One item to always include in your ISG charter is some sort of formal authorization of the group by senior leadership. Oftentimes this is simply done by having a senior executive sign the charter document. By doing this, you can ensure the steering group is authorized to perform the work outlined in the scope section of the project charter.

An item that is often left off of an ISG charter is the expectations of group members section. I find that having this section helps to establish clear expectations for everyone involved in the ISG. It also provides a mechanism for the steering group chair to hold group members accountable to their

responsibilities.

4. Involve the right stakeholders as members of the ISG

Involving the right stakeholders doesn't necessarily mean including a staff member from every department in your organization. Too many people can slow decision making and reduce the effectiveness of your ISG. ISG's are most effective when they are comprised by a few people that are highly influential throughout the organization and are able to make quick decisions (and stick by them). However, the ability to change membership and roles of the ISG are an important part of the procedural items to include in your charter.

5. Understand the Organizational priorities

One of the most important functions of an IT governance body is to help ensure that IT priorities align with the priorities of the organization. Therefore, it is important that every member of the governance body have a clear, in-depth understanding of organizational priorities. Watch out for especially vocal members of the steering group that may be trying to address their specific needs rather than the larger, organizational needs. It also never hurts to have a senior member of organizational leadership occasionally attend meetings. This helps to provide the steering group an opportunity to hear from the top any key issues that the ISG should be addressing.

6. Know your IT Project Capacity Before Chartering the Steering Group

I have yet to see an IT department that was large enough to do everything that was asked of it. An IT Steering committee or IT council can go a long way in helping to establish IT priorities that align with the organization. However, if the IT department does not understand its capacity for new projects, a steering committee can actually make the problem worse and approve projects that far exceed capacity.

7. Talk to Others

Perhaps the most overlooked resource when setting up an ISG is your peers. If you are in Higher Education, talk to other institutions, see what they did and gain an understanding of what worked for them and what didn't. If you are in the public sector, talk to other agencies the same size as yours. See what political challenges they rant into and how the overcame them. If you are in private sector, sometimes it gets a little harder to talk to your peers. However, you can always look to other steering committees within the organization, even if they are in HR or finance. Learn how they were created, and what has worked well for them. Oftentimes we overlook the treasure trove of information that is within our own organization.

Hopefully this article has given you a few things to consider when creating your own ISG. Remember you may not get everything right the first time, so allow the group to evolve. Have your ISG take on simple challenges first and then move on to bigger issues. And last but not least, don't be afraid of change. If something isn't working in your ISG, talk to the group and change it.