IT STRATEGIC PLANS: 5 GREAT EXAMPLES

No two strategic plans are created equal, nor should they be. An organization's IT Strategic plan should reflect the unique needs of the organization as well as the market in which it operates. Higher education is no different. While many universities share similar challenges, the solutions to those challenges must be considered in the overall context of each university individually.

This article is intended to provide some great examples of strategic plans to help make the creation of your plan a bit more insightful. While every university has their own take on the strategic planning, process, I tried to find examples that have unique approaches that can inspire thinking that is more creative in your strategic planning efforts.

Things to look for in strategic plans

There is no right or wrong way to write a strategic plan. Here are the some of the things that I believe contribute to a more effective strategic plan:

- **Technology Impact** - Does the strategy recognize and acknowledge that changes in technology can have significant impact to the University as a whole?
- **Commitment to Investing in People** - Does the strategy recognize a need to invest professional development to leverage modern technologies?
- **Representation from across the University** - Does the development of the strategy include representation from the distributed units found on most campuses?
- **Update Mechanism** - Does the strategy provide a mechanism for updating it?

- **Easy to Understand** - Can the goals of the strategy be easily understood, and applied to daily operations within units?
- **Pathway to Success** - Does the strategy include an assessment of the current state, a vision of the future, and a pathway for achieving the desired future state?
- **Tangible Outcomes** – Does the strategy provide a clear picture of what success looks like with a defined outcome?
- **Understanding of the Influences** – Does the strategy allow the reader to understand the influences and pressures on the university.
- **Descriptive not Prescriptive** – Does the strategy provide a description of the outcomes without describing individual tasks that must be accomplished?

University of Oregon

Why you should read it

The University of Oregon is taking a rather unique approach to strategic planning. They are focusing on transforming IT to support their president's initiatives to "improve academic and research excellence." If you are part of an institution in the middle or considering a major change to how IT services are provided, you should definitely read about what the University of Oregon is doing.

It can be found here: https://provost.uoregon.edu/content/it-strategic-plan

Oregon's approach to IT strategic planning is directly aligned to the University's top institutional priorities. Specifically, priority #4 is to "Enhance physical, administrative and IT infrastructure to ensure academic excellence."

UO's strategic planning work is definitely not a quick read. However, it is well worth the time spent to read through the steps they have taken to transform their IT organization.

UO's unique approach has 4 sections:

Governance (https://provost.uoregon.edu/it-strategic-plan-governance) focuses on creating the new governance structure that will make recommendations to the provost. Their proposed governance structure provides a great model for consolidation while addressing the needs of individual academic areas as well as individual IT staff members.

Leveraging Resources (https://provost.uoregon.edu/it-strategic-plan-leveraging-resources) recognizes that IT resources are limited and provides a few short-term initiatives to help conserve those resources.

Investments University of Oregon's IT Strategic Plan – Investments (Archive.org version) are part of the overall transforming IT process an UO. They understand that although there are efficiencies to be gained, significant investments are also needed to ensure the new IT organization is successful.

Next Steps – Transform IT (https://provost.uoregon.edu/content/transform-it) is the section of their planning process that focuses on implementation. It contains updates on where UO is in the transformation process of building the new IT organization. It contains all of the initial data and reports on what created the need for transformation. It also has updates on where they are in the process.

Other Thoughts

As I mentioned previous UO doesn't have your typical strategic plan document. What they have created is a strategic planning process for IT that allows for continual update and evolution as new challenges develop. If you are required by leadership to create a specific strategic planning document, UO provides a great example on what to consider even if it doesn't have a single document that represents the plan.

University of Michigan

Why you should read it

University of Michigan has created a very easy to read strategic plan focused on 5 goal areas of the university. Specific initiatives are then aligned to each (and sometimes multiple) goal areas. If you are looking for a strategic plan that provides a good framework for strategic planning across the university, then the University of Michigan provides a great example.

It can be found here: http://cio.umich.edu/it-strategy/strategic-plan

U-M's strategic plan is a great example of an easy to read strategic plan. It is very short at only 5 pages and uses graphical elements to communicate goal alignment. The reader can very quickly get an understanding of what initiatives have impact across the university while at the same time understand how individual initiatives apply to a specific goal area.

The U-M strategic plan is a great example of being very descriptive in a strategic plan without being prescriptive. Each of the goal areas provide a high level of overview of the desired end state. The initiatives also provide tangible outcomes describing "what" must be done while still letting the operational teams decide the "How."

Other Comments

U-M provides a very unique high level strategic plan without all of the ancillary analysis that typically accompanies a strategic plan. U-M also does a really good job of using graphical elements to communicate meaning.

University of Alabama Birmingham

Why you should read it

UAB's IT Strategic Plan is a great balance of traditional strategic planning combined with a modern approach. If you are looking for a strategic plan that contains a traditional SWOT and Gap analysis with a modern easy to read "flare" then look no further than UAB.

It was previously found here (no longer available as of 8/24/2020): https://www.uab.edu/it/home/images/IT_StrategicPlan_2016_FINAL.pdf

UAB provides one of the most innovative approaches to IT strategy summaries that I have ever seen. For each of their 7 goals, there is a one-page graphic with interconnected hexagons that provide a great "at a glance" view of what each of the goals mean.

UAB's strategic plan is a great example of being descriptive while avoiding being overly prescriptive. Each goal summary page provides an overview with an accompanying appendix for each imperative (goal). Within the appendix for each goal are tactics and actions to be taken that will address each imperative. While some are very specific, UAB does a good job of striking a balance between prescriptive and descriptive.

Other Comments

I really like how UAB separated out the detailed tactics and actions from the goal summary pages. In my experience, most people reading strategic plans look for a good "bottom line up front". UAB's IT strategic plan does a great job of this. It starts off high level, and slowly progresses into providing more and more detail. At forty-five pages it's certainly not the shortest strategic plan, however the presentation and style make this document feel like a very short read.

University of Massachusetts Amherst

Why you should read it

UMass' strategic plan is longer than most. However, this length allows UMass to implement a strategic plan that is easily connected to all levels of the organization. If you are interested in creating a very detailed strategic plan, and willing to put in the work. UMass's IT Strategic Plan provides an excellent example of what can be accomplished.

In the Executive Summary, UMass's IT strategy has three guiding principles (pg.6). All three of these principles relate to the impact the technology can have on the teaching, research and outreach mission of the university. These principles recognize the "transformative nature of information technology" as well as the vital role of IT in achieving the non-IT goals of the university.

UMass does an excellent job describing what success looks like. UMass defined 10 goals that make up their strategic plan. Each of these ten goals are further broken down into 5 sections:

- Action Items – Easily understood actions that can be accomplished or supported by staff and faculty at any level within the organization.
- Metrics – Define clearly what success in each goal looks like. There are separate metrics for each year of the strategic plan.
- Risks – Defines clearly what failure to accomplish each goal looks like.
- Recommendations – Provides context for the action items and the goal. Gives general guidance on how goal should be accomplished.
- Costs – Established what level of investment is required for each goal.

Other Comments

While most of these sections are typical in strategic plans, you don't often see a section for risks. I really like the idea of having a risk section for each of the strategy goals. I see two main benefits of including a risk section. First, knowing the risks of not accomplishing a goal is in important step for setting priorities and understanding importance. Second, strategic plans (should) change. Oftentimes as an organization moves forward implementing a strategic plan, goals need to be removed or modified. By year two most of the planning process is a distant memory. By having the risks included

the organizations senior leadership can quickly see if any proposed changes are worth the risk.

Harvard University

Why You Should Read It

As the saying goes, "save the best for last." Harvard University has developed a great IT Strategy that is nothing less than what you would expect from an elite Ivy League school. If you are looking for a strategy that is a quick, easy, read, that contains input from all levels of the organization, Harvard provides one of the best examples I've seen.

It can be found here:

https://huit.harvard.edu/files/huit/files/april2015_cio_council_strategic_plan_update_final_0.pdf

The first thing you see when you open the document is a list of people involved in the development of the Harvard IT Strategy as well as what unit they are from. It is very clear from the beginning that the Harvard CIO council developed this strategic plan and that there is broad representation from across the university.

Harvard's strategy is only seven pages long and is a very quick read. Even a "quick skim" of the strategy can give the reader a very good understanding of what they are trying to accomplish.

Additionally, it has sections for the following:

- Trends in higher education
- University priorities
- Strengths/weaknesses
- Next Steps

Harvard's strategy first addresses "Emerging Trends in Higher Education and Technology." The narrative in this section recognizes the "disruptive change" that technology has enabled in higher education. The strategy then goes on to apply those emerging trends to the university by examining the university priorities. The authors do an excellent job of providing the context in which the Harvard IT Strategy will operate.

Other Comments

Unique in Harvard's strategy is a section on "Organizational Enablers and Barriers." By including this section, the non-IT staff of Harvard can quickly get an understanding of what can be leveraged to help the strategy succeed as well as what stands in the way of implementation. This is a slightly different approach than the typical strengths and weaknesses. I think it provides an excellent way of framing what will help and what will hinder implementation of the strategic plan within the Harvard context.

Additional Resources