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Centralizing IT: Leadership Summit
Great Universities Require Great Information Technology

Presented by: Mike Kubit

February 22, 2016

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PURPOSE

To Bring Together IT Leadership to Review the Direction + Strategy for the Future

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Our Approach: Strategic Planning Model

- Desired Future State - Where do we want to be?
- Current State - Where are we now?
- Strategies - Bridge between current state and future state

What Makes Change Hard

- Inwardly focused cultures
- Paralyzing bureaucracy
- Parochial politics
- A low level of trust
- Lack of teamwork
- Arrogant attitudes
- Lack of leadership in middle management
- Fear of the unknown

Source: Kotter, John, Leading Change, Harvard Business School Press, 1996

MOVING INTO A NEW FUTURE TOGETHER

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Agenda

Time	Item
9:00 - 9:10	Welcome + Opening Remarks
9:10 - 9:30	Ice Breaker
9:30 - 10:00	Communicating the Mission + Review IT Strategic Planning Themes
10:00 - 10:10	Break
10:10 - 11:10	Creating a Shared Vision (Part 1)
11:10 - Noon	Creating a Shared Vision (Part 2)
12:00 - 1:30	Lunch; Brain Science of Change
1:30 - 2:30	SWOT Review + Update
2:30 - 2:50	Assessment Strategy
2:50 - 3:00	Break
3:00 - 4:00	Development of High-level Project Plans
4:00 - 4:15	Closing Remarks, Questions, Feedback

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Ice Breaker: Two Truths + Lie

- Create two truths and a lie about yourself
- Share with people at your table
- Identify the lie
- Learn about each other

Centralizing IT: Leadership Summit
Communicating the Mission + IT Strategic Plan Themes

Presented by: Sue B. Workman

"Where Good Ideas Come From"

"Transformational leaders don't start by denying the world around them. Instead, they describe a future they'd like to create instead."

Seth Godin

LEADER

DISRUPTIVE CHANGE
(I USED TO BE A CATERPILLAR!)

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TRANSPARENCY

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OUTCOMES

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INTEGRITY + ETHICS

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The Goals

- Most importantly, reduce and effectively manage the risk profile of CWRU

- Ensure business continuity and disaster recovery readiness by leveraging best-practices across the university

- Improve the "IT experience" across all areas of the university

- Optimize the university's investments in information technology

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The Process

- Executive IT Support team created; started in Adelbert Hall
- Assess and optimize UGEN departments delivering IT services
- Schools and College
- Highly collaborative initiative; includes stakeholders from across CWRU
- Initiative focused on moving the culture from "us vs. them" to "we"

# The Plan: Next Steps (Inclusive and Collaborative)

- Planning
  - Retreat with CTO's
  - Meeting with Financial Officers
  - Meetings with Executives and Deans

- Assessment
  - Services
  - Infrastructure
  - Personnel

- Optimization
  - Utilize industry best-practices
  - Maximize return on investment
  - Leverage IT talent on behalf of the university
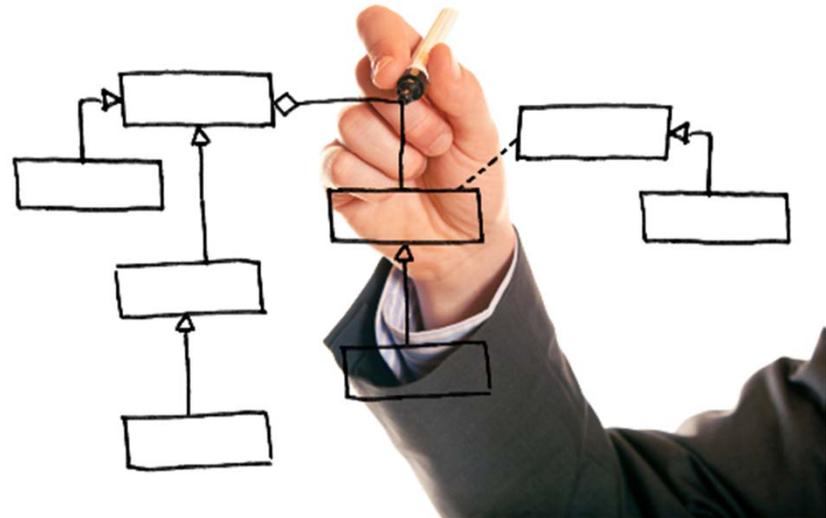
Benefits:

- Consistent approach to security, business continuity, disaster recovery

- Inventory and asset management

- Ready for RNC in Cleveland

- Leveraging the total IT human resource

- Enterprise scale – equipment, software, classrooms

- Allow leaders and faculty to concentrate on their value add

RE-IMAGINING IT
IT STRATEGIC PLAN - LEAD TO ACHIEVE

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ITSP Categories

- Addressing fundamental elements
- Advancing a new normal
- Empowering new innovations
- Breaking down barriers

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ITSP THEMES

THEME 1: Enabling Student Success + Enhancing the Student Experience

THEME 2: Facilitating Effective + Cutting-Edge Teaching + Learning

THEME 3: Enhancing Research, Scholarship, Creative Activity + Academic Innovation

Theme 4: Improving + Strengthening IT Foundations (Infrastructure, Operations + User Experiences)

Theme 5: Information Security, Regulatory Compliance + Technology-Focused Business Continuity

Theme 6: Enabling + Expanding the Use of Institutional Data in Decision Making

Theme 7: Organizing + Funding Information Technology Strategically

Theme 8: Attract, Retain + Empower Technology Team Members

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THEME 1
Enabling Student Success + Enhancing the Student Experience

STUDENT SUCCESS

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THEME 2
Facilitating Effective + Cutting-Edge Teaching + Learning

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TEACHING + LEARNING

Photo Credit: Haiku Deck

ONLINE EDUCATION

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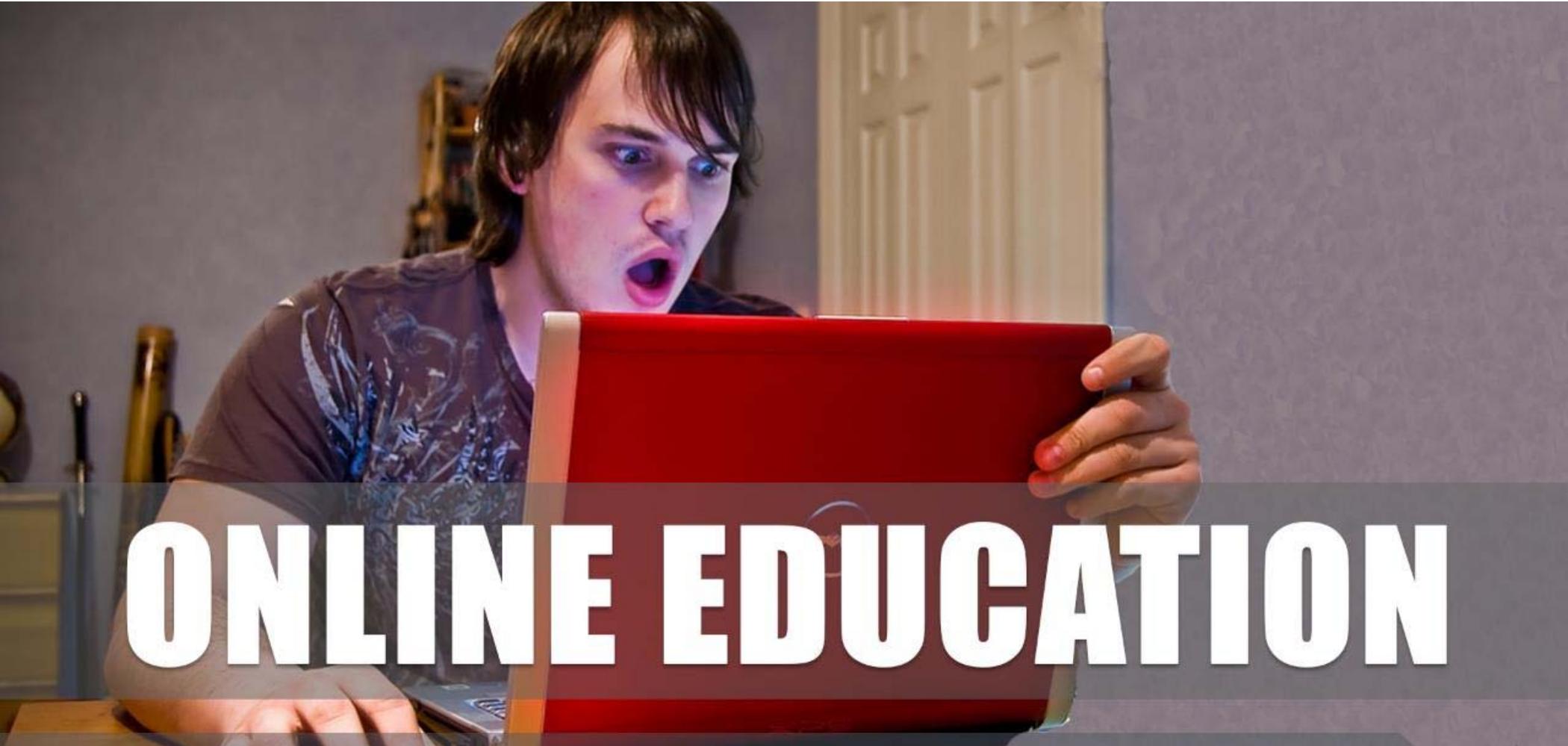
THEME 3
Enhancing Research, Scholarship, Creative Activity + Academic Innovation

RESEARCH TECHNOLOGY

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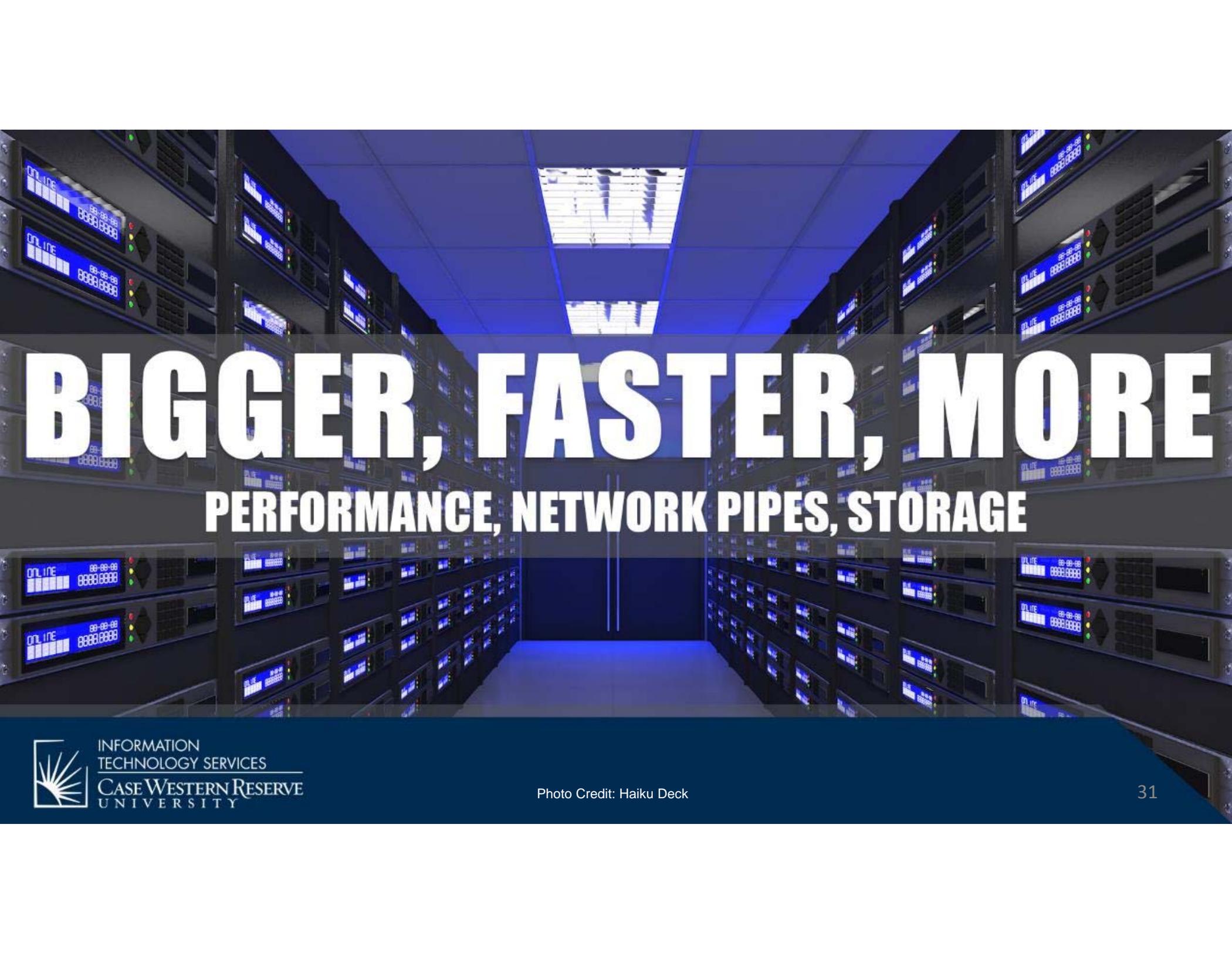
BIGGER, FASTER, MORE

PERFORMANCE, NETWORK PIPES, STORAGE

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THEME 4
Improving + Strengthening IT Foundations
(Infrastructure, Operations + User Experiences)

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INFRASTRUCTURE

SERVICE + SUPPORT

THEME 5
Information Security, Regulatory Compliance + Technology-Focused Business Continuity

SECURITY + RISK

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ANALYTICS + BIG DATA

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ORGANIZING + FUNDING

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THEME 8
Attract, Retain + Empower Technology Team Members

PREEMINENT STAFF

INNOVATOR

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RESILIENT LEADERSHIP

COMMUNICATION

"An Idea In the Shower"

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Questions + Feedback

WHY DO ATHLETES DO IT

Organizational Visioning

- Where do we want to go?

- How do we get there?

- What products and services to offer?

- What do we need to do?

Important Factors for Creating a Vision

- Reflect a variety of perspectives

- Built through careful dialogue and thought

- Accurate understanding of current conditions

- Supported by plans to implement/maintain vision

- Follow-through and nurturing

Group Process Reasons

- Broad range of viewpoints/expertise

- Ideas tested, discussed, refined by diverse perspectives

- Commitment for action-oriented activities

- Team-building fosters organizational cooperation

- Understanding of issues, challenges and opportunities

- Break away from "status quo" mind set
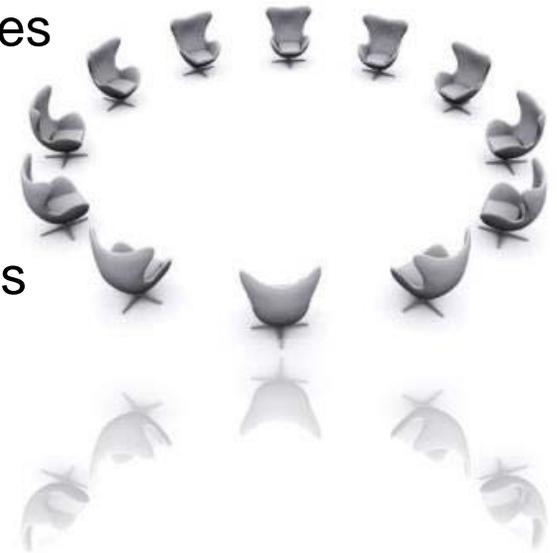
Conditions of a Powerful Vision

- Current condition
- Desired condition
- Does gap between "what is" and "what ought to be" exist?
- Identify and fill gap
- Create plan of action
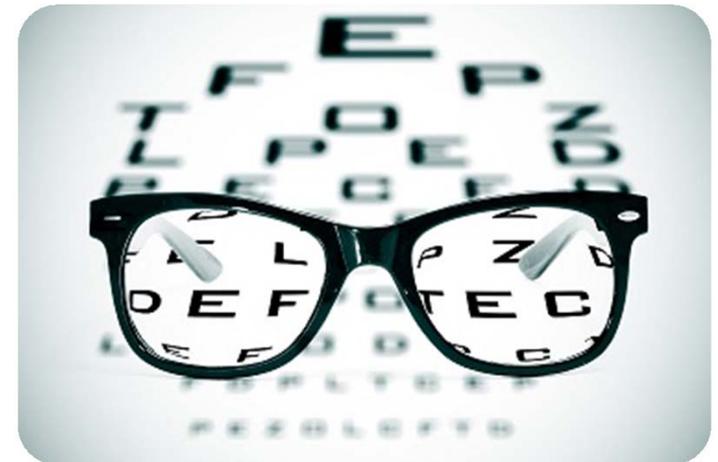
Vision Describes Future Hopes

- Shared and supported

- Comprehensive and detailed

- Positive and inspiring

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Vision Statement Details

- Broad yet specific (strategic) direction

- Pursue toward making a positive impact

- Includes activities that must occur

- Not there yet; hope to become

- Internal resource

Mission Statement Details

- Philosophical in nature

- Describe why your organization exists

- Describe target audiences

Table Exercise, Part One: Creating the IT Vision Statement

- Each table creates vision statement (30 minutes)
- Report out table vision statements; view on screen (20 minutes)

Part One Table Vision Statements

1. X
2. X
3. X
4. X
5. X
6. X
7. X
8. X

Table Exercise, Part Two: Creating the IT Vision Statement

- Using eight table statements, each table creates new vision statement (20 minutes)

- Report out table vision statements; view on screen (10 minutes)

- Group consolidation of final vision statement (20 minutes)

TABLE EXERCISE

Part Two Table Vision Statements

1. X
2. X
3. X
4. X
5. X
6. X
7. X
8. X

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Final Vision Statement

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Lunch - Brain Science of Change

Presented by: Bob Hall

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Centralization S.W.O.T Analysis

Presented by: Mike Kubit

Open Forum S.W.O.T Results

- Strengths
    - Funding/purchasing power
    - Ability to streamline
    - Dedicated, knowledgeable and talented staff
    - Career advancement
    - Relationship building
    - Sharing information
    - High-level service/support

Open Forum S.W.O.T Results

- Weaknesses
  - Money/resources
  - Risk of security breach
  - Staffing questions; "Will I lose my job?"
  - Unable to provide Platinum Support
  - Decentralized culture
  - Difficult to identify who is IT

S.W.O.T

Open Forum S.W.O.T Results

- Opportunities
  - Reduced costs/redundancy
  - Standardization
  - Customer service; understanding the end-user
  - Career development
  - Sharing/connecting with other groups

Open Forum S.W.O.T Results

- Threats
  - Loss of employees
  - Decrease in service level
  - Funding from the University
  - Decision making/management
  - Loss of institutional knowledge via transfer

Table Exercise: Strengths, Weaknesses, Opportunities, Threats

- Focus on each category; one at a time
- Use small Post-It notes
- Attach Post-It notes to flip charts
- Highlight top five
- Report out
- Next category

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Gap Analysis - Assessment Strategies

Presented by: Mike Kubit

GETTING ORGANIZED
Assess, Consolidate, Optimize

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Assessment Strategies: Opportunities for Involvement

- Communications
- Hardware, Infrastructure + Applications
- Budget + Finance
- Personnel
- Service Management
- Security + Policy
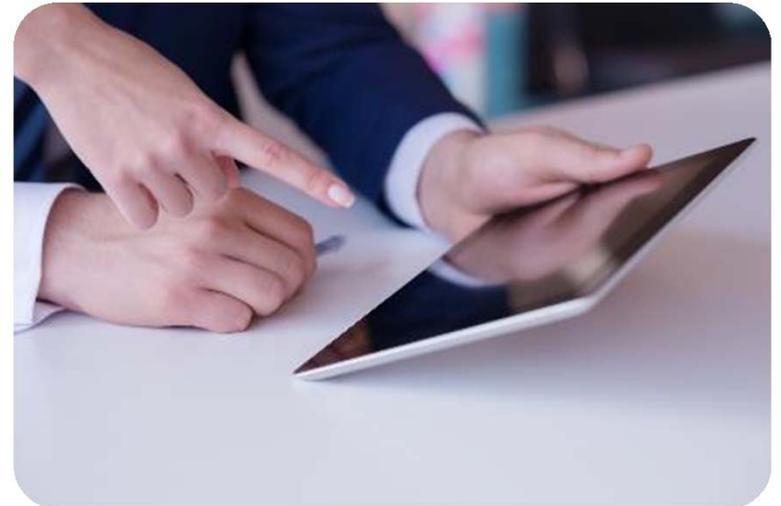
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Action Plans - From Point A to Point Z

Presented by: Mike Kubit

Table Exercise: Action Plans

- 30 minutes; high-level project planning

- Identify tasks and opportunities

- Report out

- Develop action plans

Next Steps

- Monthly IT Leadership meetings

- Monthly "brown-bag" lunches for campus IT professionals

- Include distributed IT leadership into current central IT leadership meetings

- Complete consolidation of UGEN IT

- Begin transition of current CTO reporting lines to DCIO (remainder remain intact)

- Reduce risk surface by consolidating distributed servers into CWRU Data Centers, VM or cloud service provider

- Regular status reports on activities related to centralization efforts

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Discussion, Feedback and Questions