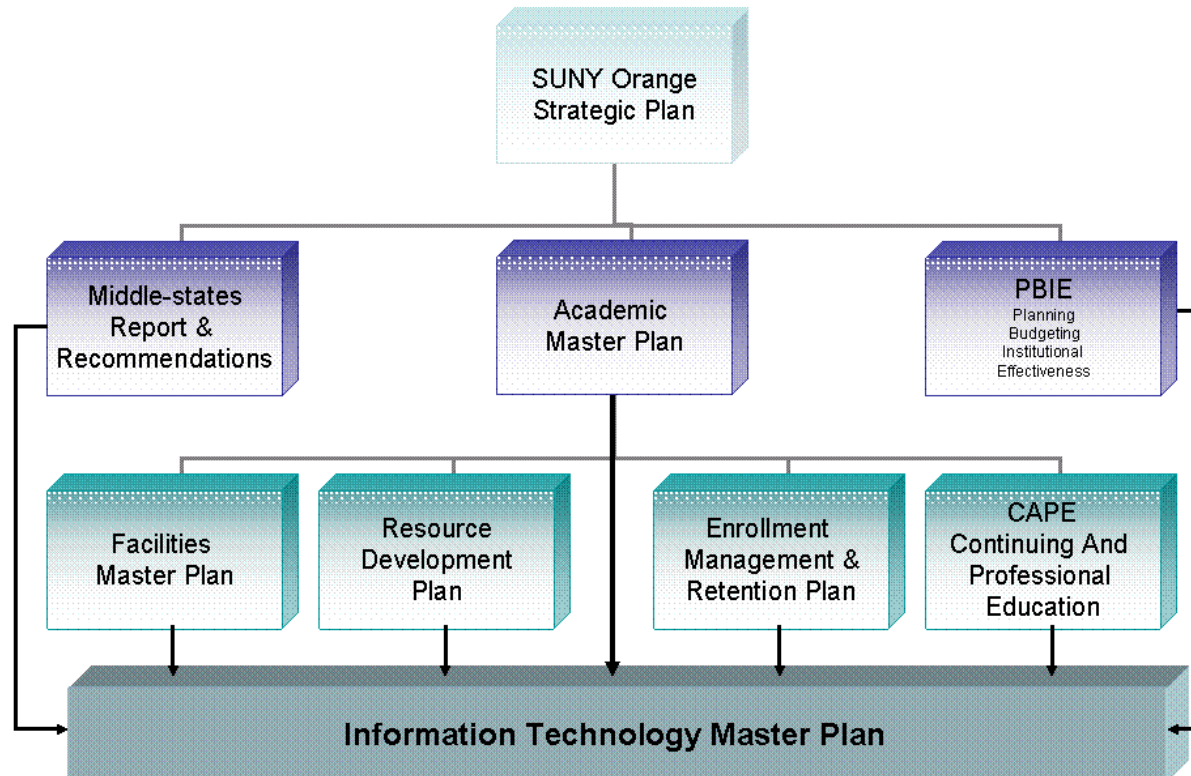


# IT/ITS Planning

As illustrated below the IT Master Plan is foundational to all that SUNY Orange will be doing into the future. The chart illustrates how other plans developed influenced the creation of the SUNY Orange IT Master Plan.

## SUNY Orange Strategic Plan - Themes

- Provide a symphony of opportunities for all citizens by expanding the range programs and services
- Improve students' persistence and academic success so that the college becomes "one of the most richly rewarding experiences"
- Increase the effectiveness of all college operations in order to fulfill our promise to "...be the most efficient in shepherding resources"



## Strategic IT Planning - Methodology Overview

This overview tool will help you assess the amount of work that needs to be done to complete this methodology. Completing the stages of this methodology leads to the creation of a formal Strategic IT Plan. Every step should be completed as part of this process, however, you may have already completed much of this work as part of other projects. For example, you may have already documented your hardware and software infrastructure as part of a Disaster Recovery Planning project. In these cases you can check off the stage as done and significantly reduce the estimated hours it will take to progress through the Strategic IT Planning process. Note that the estimated effort may include more than one individual. In the case of meetings, the hours listed are the duration of the meeting.

Date Started	Date Completed	✓	Stage	Key Tasks	Estimated Effort - Hours		Your Expected Hours	Estimated Duration - Days		Your Expected Duration
					Low	High		Low	High	
			<b><u>Stage 1: Plan the Plan</u></b>		<b>7</b>	<b>15</b>		<b>3.5</b>	<b>15</b>	
		<input type="checkbox"/>		Set Strategic Planning Goals	3	6		2	7	
		<input type="checkbox"/>		Establish a Planning Group	1	2		0.5	2	
		<input type="checkbox"/>		Hold a Kick-Off Meeting	1	2		0.5	1	
		<input type="checkbox"/>		Create a Preliminary Report	2	5		0.5	5	
			<b><u>Stage 2: Document Your Business Strategy</u></b>		<b>9.5</b>	<b>30</b>		<b>3.5</b>	<b>15</b>	
		<input type="checkbox"/>		Describe the Company and Its Background	1	3		0.5	2	
		<input type="checkbox"/>		Conduct and Industry Analysis	2	6		0.5	2	
		<input type="checkbox"/>		Document Vision, Mission, and Core Values	1	4		0.5	2	
		<input type="checkbox"/>		Define Core Business and Its Boundaries	1.5	5		0.5	2	
		<input type="checkbox"/>		Create a Financial Picture	2	8		1	5	
		<input type="checkbox"/>		List Strategic Objectives	2	4		0.5	2	
			<b><u>Stage 3: Assess the Current IT Situation</u></b>		<b>23</b>	<b>66</b>		<b>5.5</b>	<b>30</b>	
		<input type="checkbox"/>		Document Your IT Organizational Structure	4	8		1	3	
		<input type="checkbox"/>		Document Your Hardware and Software Infrastructure	12	40		3	20	
		<input type="checkbox"/>		Audit Current IT Projects	4	12		1	5	
		<input type="checkbox"/>		Understand the IT Environment	3	6		0.5	2	
			<b><u>Stage 4: Propose a New IT Situation</u></b>		<b>12</b>	<b>25</b>		<b>6</b>	<b>15</b>	
		<input type="checkbox"/>		Analyze IT Strengths and Weaknesses	4	7		1	3	
		<input type="checkbox"/>		Brainstorm Technology Opportunities	4	10		3	7	
		<input type="checkbox"/>		Document Your Results	4	8		2	5	
			<b><u>Stage 5: Perform a Gap Analysis</u></b>		<b>8</b>	<b>19</b>		<b>3</b>	<b>11</b>	
		<input type="checkbox"/>		Analyze Alignment Gaps	3	8		0.5	2	
		<input type="checkbox"/>		Analyze Infrastructure Gaps	1	3		0.5	2	
		<input type="checkbox"/>		Summarize and Resolve Gaps	4	8		2	7	
			<b><u>Stage 6: Propose a Strategic Vision and Governance Model</u></b>		<b>6.5</b>	<b>16</b>		<b>2</b>	<b>7</b>	
		<input type="checkbox"/>		Hold a Vision Meeting with Stakeholders	4	7		1	3	
		<input type="checkbox"/>		Establish a Strategic IT Vision	1	4		0.5	2	
		<input type="checkbox"/>		Propose a Governance Structure	1.5	5		0.5	2	
			<b><u>Stage 7: Build a Strategic Decision Making Framework</u></b>		<b>9</b>	<b>24</b>		<b>2.5</b>	<b>9</b>	
		<input type="checkbox"/>		Set Strategic Goals and Measures	1	3		0.5	2	
		<input type="checkbox"/>		Perform a Budget Analysis	2	5		0.5	2	
		<input type="checkbox"/>		Identify Your Options	4	12		1	4	
		<input type="checkbox"/>		Prioritize Your Projects	2	4		0.5	1	
			<b><u>Stage 8: Publish, Promote, and Maintain Your Strategy</u></b>		<b>7.5</b>	<b>21</b>		<b>8</b>	<b>18</b>	
		<input type="checkbox"/>		Build Your Strategic Plan Documentation	3	8		3	6	
		<input type="checkbox"/>		Present Your Plan to Senior Management	1.5	3		3	5	
		<input type="checkbox"/>		Communicate and Manage Change	3	10		2	7	
			<b>TOTAL ACTIVITY (HOURS/DAYS)</b>		<b>82.5</b>	<b>216</b>		<b>34</b>	<b>120</b>	

# IT Master Plan & PBIE

- IT Master Planning will coincide with the Academic Master Plan
- IT Master Plan goals/objectives project proposals will be reviewed/approved as per the established PBIE/PIP planning cycle methodology (as follows)

**Inputs:**

- Current Situation (KPI – PPI/QCI); NCHEMS/CHES
- Federal/State/Local Requirements
- SUNY Requirements (Gen Ed; SLO)
- Middle States Requirements
- External Accreditation
- Mission Review

**Outputs:**

- Strategic Plan (Mission, Vision, Values, Goals)
- Academic Master Plan
  - Facilities Master Plan
  - Enrollment Master Plan
  - Development Master Plan
  - CAPE Master Plan
  - IT Master Plan

(each plan contains)

**Goals:**

- 1 or more objectives per goal
  - Are measurable
- Relate to previously developed
  - Key Performance Indicators
    - QCI
    - PPI
    - NCHEMS/CHES

(developed into)

**Project Plans/Proposals:**

- In support of 1 or more goals/objectives (PTBS\*\*)
- Each has measurable KPI's
  - Schedule
  - Budget
  - Student Retention
  - Student Satisfaction
- Relate to previously developed
  - KPI; NCHEMS/CHES
    - QCI
    - PPI

**Assessment-Outcomes**

- Decision to keep/continue/adjust plans
- Sunset/redeploy resources
- Output here is input into the next planning cycle

(decide)

(communicate & report)

**Assessment-Outcomes (RTBO\*\*)**

- KPI's
  - Schedule
  - Budget
  - Student Retention
  - Student Satisfaction
- Relate to previously developed
  - KPI; NCHEMS/CHES
    - QCI
    - PPI

(measure)

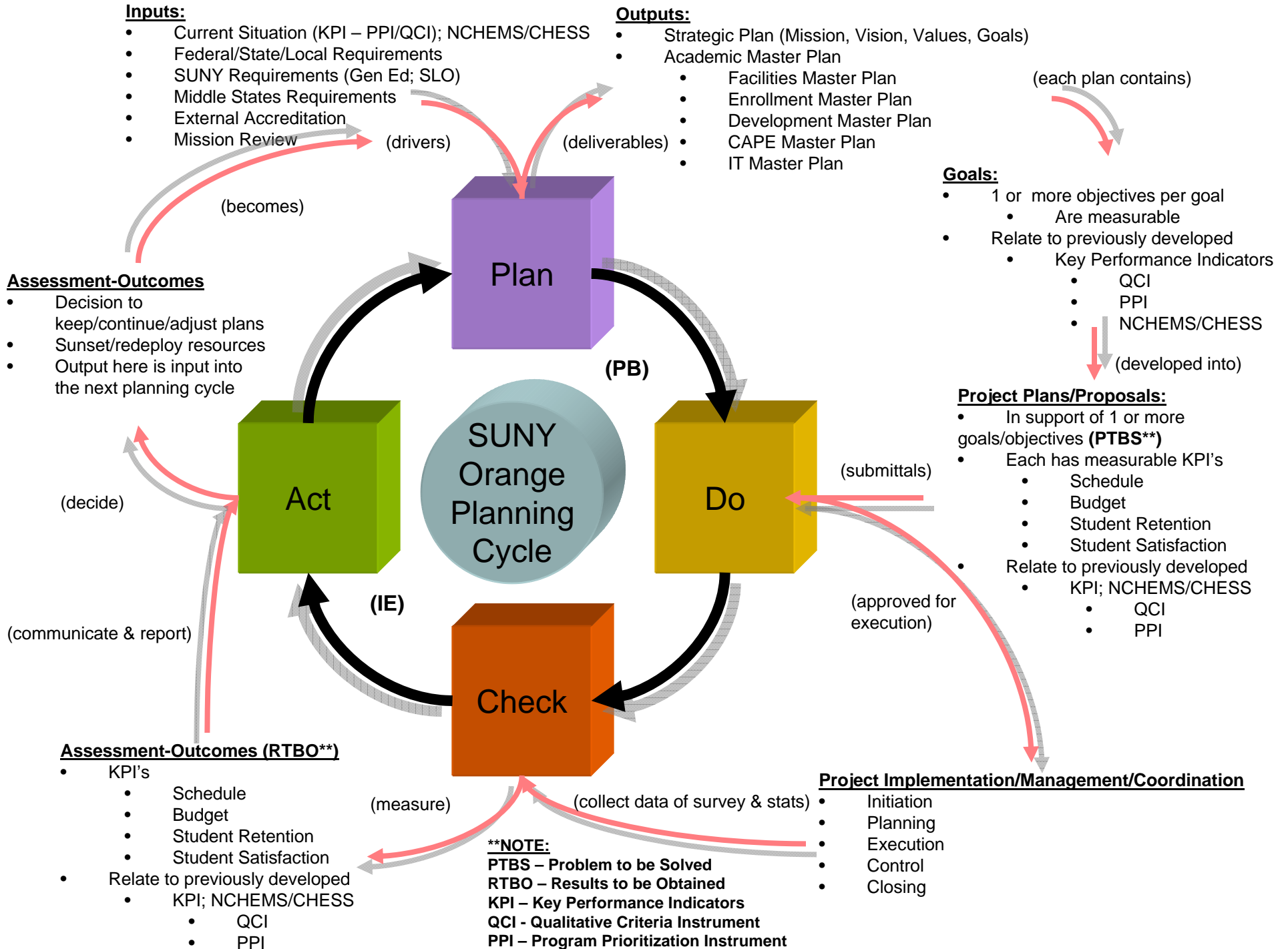
(collect data of survey & stats)

**\*\*NOTE:**

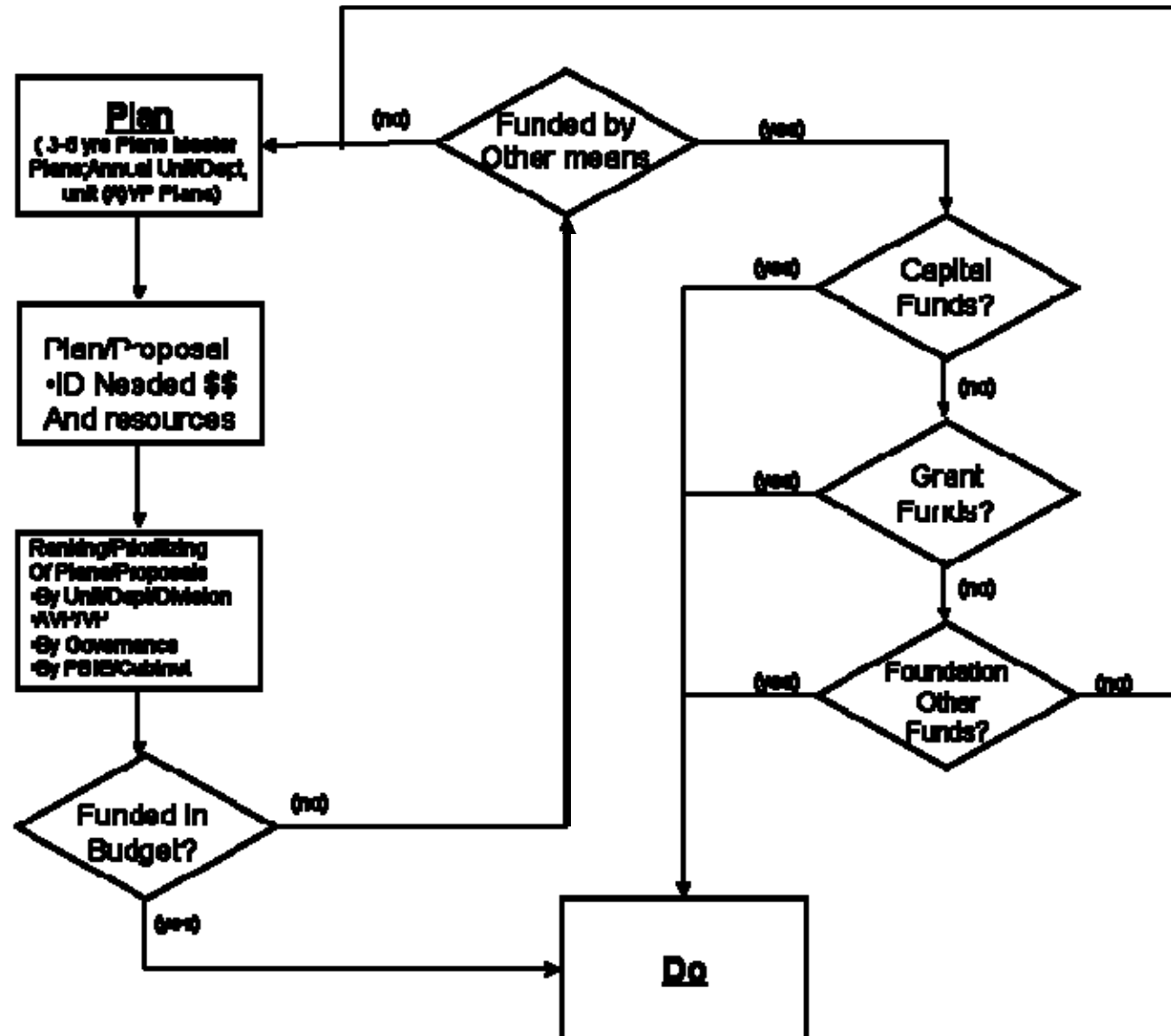
PTBS – Problem to be Solved  
 RTBO – Results to be Obtained  
 KPI – Key Performance Indicators  
 QCI - Qualitative Criteria Instrument  
 PPI – Program Prioritization Instrument

**Project Implementation/Management/Coordination**

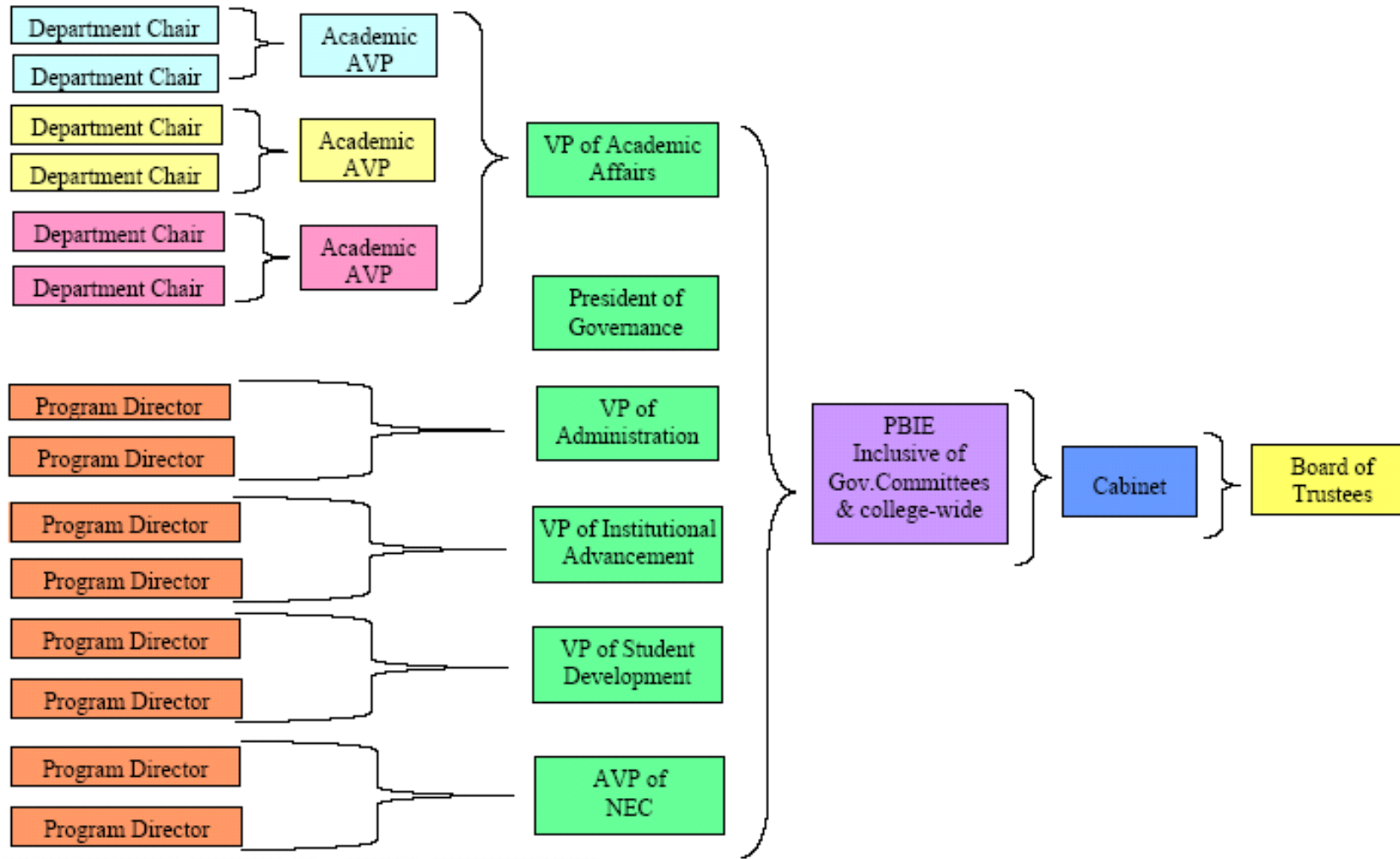
- Initiation
- Planning
- Execution
- Control
- Closing



# Submittal/Approval Process for Funding Projects/Proposals



# Process Flows – Approval & Rankings Workflow



# Project Plan/Proposal Ranking Criteria

- **Strategic Goal(s)/objectives** matched with
- **Required**
- **Flexibility**
- **Need of System**
- **Staff or System Reduction**
- **Reach/support customer (student) base**
- **Increase effectiveness**
- **Current State**
- **Implementation (One Time) Cost**
- **Operational cost**
- **Increased revenue**
- **Legal/Regulatory Requirement**
- **Security/Privacy Requirement**

# From Strategic to Operational Planning

