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.

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

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

Assessment-Outcomes (RTBO**)
- KPI’s: Schedule, Budget, Student Retention, Student Satisfaction
- Relate to previously developed KPI; NCHEMS/CHESS
- KPI – Key Performance Indicators
- QCI – Qualitative Criteria Instrument
- PPI – Program Prioritization Instrument

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

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/CHESS

Project Implementation/Management/Coordination
- Initiation
- Planning
- Execution
- Control
- Closing

PBI – Program to be Implemented
IE – Inputs
PB – Planning
IE – Implementation
P – Planning & Analysis
CE – Check/Estimation
R – Review
A – Approval
B – Budget
D – Determination
L – Limitation
I – Inspection
C – Control
O – Order
Submittal/Approval Process for Funding Projects/Proposals

Plan
- 3-5 yrs Plan meets Plane/Annual Unit/Dept., unit ($VP Plan)

Plan/Proposal
- ID Needed $$$
- And resources

Ranking/Prioritizing of Plan/Proposals by Unit/Dept/Division
*AW/VP*
*by Governance*
*by FED/State*

Funded in Budget?

Funded by Other means

Capital Funds?

Grant Funds?

Foundation Other Funds?

Do

(yes)

(no)

(yes)

(no)

(yes)

(no)

(yes)

(no)

(yes)

(no)
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

Strategic & Master Planning Development

Tactical Development & Implementation (ITSM Roadmap – Organization integration)