

## IT Strategic Plan - Campus Leadership Briefing

<b>Division or Area</b>	Finance and Admin Services
<b>Date</b>	01-22-18
<b>Number of Participants</b>	35 attendees (Admin/Staff) 14 attendees (Deeper Dive Session)

### Summary of BIG Ideas:

- **Technology Learning Center** - Conduct regular training all the time.
- **Breaking Down Silo** – need a more formal process for knowing what projects are needed or in the future
- **Next Generation Working Environment** - Attract and retain skilled staff, Can't always be compensation, Telecommuting, Need technology to support these staff
- **Unified or general Communications** – for students but needs to have tracking.
- **Security and Privacy** - we need to make sure they can safely use the mobile app to secure their personal data.
- **Technology Learning Center** – IT training center for faculty, staff and students.
- **Data and Analysis** – Need data Governance.
- **Academic vs Administrative Technology** –technology support which fully understands the business processes of the area.
- **Stakeholder Engagement** – more involvement of stakeholders in software solutions.
- **Project Management Office** – help with solutions and implementations.

### Questions: What have we missed?

- **Project Management** – There are technologies that are stretch goals, that's great, but how are the goals going to be carried out. Is there a plan for governance of this plan? The way projects develop are an important aspect. (IITS) when the IITS met in a retreat, we worked on moving the larger list to a shorter list of trends.
  - Example: Palliative Care wants to implement a technology. They are narrowed on the software they want. Salesforce might be a solution for them. How do they get involved on it before they purchase something else?
  - One of the trends for example was VR. Project management was also listed as a trend back in May. There are technology components in many projects.
  - For the governance aspect, when the IMSC meets they are briefed on technology aspects. Maybe we need to add a better way to communicate what technology aspects are being discussed. TPAC and IMSC are getting the information, we will figure out a better way to communicate the information at the appropriate times.
- **Project Management and Breaking down Silo** - Is there a formal process for knowing what projects are needed? Example – when we hear about projects sometimes the coordination of the projects need to be in synch so that we don't have multiple integrations. Sometimes just asking the question can activating staff.
  - Challenge noted as “breaking down the solos”, but we will add governance and project management, priorities on projects.
  - There used to be a group called Administrative Projects Steering Comm. It may be a good idea to review the charge of that committee. Administrative Projects Steering Committee – Representatives would have discussions of what they were interested in and needed.

Nothing came out of it. Should it be brought back? They were looking for more structure that wasn't in place at the time of transition.

- **New** - A new suggested theme – add Next Generation Working Environment. There are tools and support to retain staff, as we talk about next gen learning, add office. Next Generation Working Environment ideas:
  - Attract and retain skilled staff
  - Can't always be compensation
  - Telecommuting
  - Need technology to support these staff
- **Unified or general Communications** – The right kinds of future communications. How we as service providers communicate effectively. Email is not working. Ways that we communicate and the modes that will be needed for the future. Also includes Mobile First. (IITS) if we can send targeted messages to their phone then we will be experimenting with that. The app can be used in the future to not be a text but it would appear on their home screen. Other universities are doing this now. SMS is too private, chat is an option, but targeted communications is best.
  - Sometimes people want the ability to chat with or call someone
  - Break out of the traditional communications channels.
  - Tracking that we send the communication is needed on the administrative/Student Financial perspective.
  - Students want different communications, parents may want an email. (IITS) We will have the ability to provide delegated access for students at more than one level of access (Financial Aid vs grades).
  - What is the right communication that we sent in the future?
  - Are we thinking about not sending emails since that's not how students expect to be communicated to?
  - Are we using the right mode of communication for faculty, staff, and students?
  - SMS to our students through PeopleSoft – has there been a discussion on this? Do students want it?
  - It needs to have tracking so we can tell students that the message was sent.
  - Parents might want a different message letting them know that tuition is due so students don't get dropped from courses.
  - Parents need special access (delegated) to see specific items for their student
- **Security and Privacy** – what about when students lose their phone. There are location based security that will allow us to get specific, a student assistant location in/out of the office, more detailed logs in the Grey Heller firewall.
  - We assume students are tech savvy but we are hearing that we need to make sure they can safely use the mobile app to secure their personal data.
  - We need to help students understand how to keep their personal data secure.
- **IT Training** – There is a need for technology Learning Center. Maybe there are ongoing classes to make sure we help staff and faculty with questions.
- **Online Learning and Experiences** – Where would PeopleSoft Fluid be listed? There are ways to front end the current PS with something like Salesforce. The front end may be operated by a department maybe. There CSU is looking at ways to not have so many mods in PeopleSoft but still be able to coexist the important transactional data. The strategy for connecting the data is being discussed in detail at many levels in the CSU.

From your list of big ideas, please share the trends, themes and ideas that you think we should be considering for the Technology Strategic Plan.

- How do we listen to the campus colleges and other master plans, stay above the operations. There are related projects and plans that do not talk together.
  - For Facilities, how does technology change in the use of the faculty? How do we build out our spaces so that the front of the room can change?
- **Concern** – Human interaction skills are still needed. There are the 3 core technical abilities (critical thinking, communications skills, and personal engagement). How to solve a problem with each other without texting.
  - Example – Cashier has to find the right “similar” item. VR is good for students but they also need personal skills as nurses.
  - How is the plan the right place? As this is the campus-wide strategic plan, the values needed by students, critical thinking is needed. Someone is choosing to send them a news feed. GPS may tell us to go on a certain route; students need to override the information if needed. Critical thinking, communication skills, and personal engagement
  - As the campus moves forward these values are still needed to be successful in their future job. We fail as an institution if we don’t keep this in focus.
  - The IT strategic plan has to align with the university plan –
- **Technology Learning Center** – There are ideas that the departments have, there may be IT products already in place, like a technology service center. Who is the strategic connection that understands the business needs? (IITS) rethinking the help desk to be a strategic conversation. There is a need to help the departments with IT training in a larger scale.
- As people retire or leave IITS, who do they contact when they have a big idea? They go to Mike. He puts them in contact with the correct person/group. Those relationships are important. Is there a technological storefront that someone could go to and get this information? Who will help them implement new ideas when the person they know leaves or moves on? How can they know who is in what roles within the IITS to get help with their technology needs and ideas? Who will understand their business needs?

Questions: What will these trends affect our future?

From the list of trends, which do you feel could have the most impact on your area?

- Trends listed:
  - Focus on Customer Service
  - Data Analysis and Decision Making
  - Infrastructure
- How do we make a space that considering the infrastructure?
- Is the SF a CSU wide effort? Can they leverage Salesforce or just specific groups or is it throughout the CSU? (IITS) There is a data lake coming to the CSU to bring together a way to share data. Data governance will be very important to balance the perspective across campuses.
  - There are multiple places where data is integrated into PeopleSoft. Will SF feed to GL or use in place of? (IITS) is mostly CRM. Financials has not been in scope but there are no current boundaries. We can talk about what is needed in how to implement SF.

- As a wrap-up, If there are more big ideas please share them with Katy.
  - when we talk about the plan we are looking for the baseline technologies, how to priorities the plan goals to support areas like supporting the need for research, are labs needed in the future when students have laptops,
  - What do we need to invest in now for students who do not have laptops? Think about the questions talked about today about what services are being provided now.