

Charge to the Flagship IT Implementation Planning Committees November 17, 2006

The past year saw the successful conclusion of the information technology strategic planning process and the development of the Flagship IT Strategy. The 'FITS' was drafted and published in penultimate form last Spring, and was over the course of the subsequent months reviewed and discussed by a broad spectrum of the LSU community. The FITS was endorsed by Student Government in a resolution in April 2006, and then by separate resolutions from the Faculty Senate and the Staff Senate in September 2006. With these formal endorsements, the FITS became 'final' and serves as the blueprint for strategic advancement of IT for the University.

By design, the FITS is very much a 'what and why' document, providing an unfettered set of recommendations for developing IT infrastructure, services, and resources in support of LSU's National Flagship Agenda. It was prepared purposely separate from the complexities and constraints of implementation, in an effort to ensure that the vision of an IT abundant environment could be established free of these concerns. But now the time has come to examine those complexities and constraints, and articulate the "how and when" and "how much" of implementing the FITS vision.

The FITS stands among a select few such IT strategic plans nationally that were created out of the vision and input of the campus community of faculty, students, and staff. It has achieved the goal of being this campus' plan for information technology, having done so through the process that saw the recommendations emerge from the campus community. It is even more critical that the next phase – implementation planning – come through a similar process of community engagement.

The Flagship IT Implementation Planning process involves the evolution of the predecessor FITS Planning Task Forces. Four such Task Forces have been called to order for 2006-07 and into 2007-08 as required:

- Teaching & Learning Enablement – Chaired by Ray E. Ferrell, Alumni Professor, Geology & Geophysics
- Research IT Enablement – Chaired by Sumanta Acharya, L.R. Daniel Professor, Mechanical Engineering
- Infrastructure – Chaired by Nancy Colyar, Assistant Dean, LSU Library
- Information Systems Enablement – Chaired by Andrew Christie, Professor, Accounting

The valuable work of the Student Experience Enablement Task Force contributed to the overall success of the FITS process. However, given the interests of students are broad across all areas, and implementation efforts are more tightly focused on guidance to the divisions of Information Technology Services directly, this task force is not continued

into the next phase of the process. It should be noted that given the student authority and responsibility for oversight of Student Tech Fee spending, the Student Tech Fee Oversight Committee (STFOC) is well suited for pursuit of student-specific implementation planning actions and investments. As well, several FITS action items (4.07 and 4.08 specifically dealing with Student Tech Fee levels and spending) are completely within the purview of the STFOC, and Student Government more broadly. Student Government, as well, has direct input into the Office of the CIO involving other student-focused action items in the FITS, and this form of implementation planning is ongoing and will continue.

That said, it is incumbent upon the Chairs of the respective Task Forces to ensure that students are engaged in the implementation planning efforts, and the first charge to the Chairs is to reach out to Student Government and students in general to be actively involved in the Task Force activities. The Office of the CIO can facilitate these outreach efforts, and the Chairs are invited to call upon the CIO for assistance in engaging students and Student Government.

FITS focal purview of each Task Force:

Task Force Chairs and members are free to examine any and all recommendations and action items in the FITS, as they see fit, to accomplish their goal of producing a cohesive implementation plan. However, defining more specific focus for each Task Force will certainly advance the effort. The CIO is providing a separate document to the Chairs of assessments and comments regarding each FITS action item and his view of where it logically falls, as well as an assessment of the level of effort and degree of priority associated with each item. In general, the following guidelines are provided.

Teaching & Learning – Primary focus should be on FITS Recommendation VII: *Develop robust and plentiful IT resources to enable faculty teaching and student learning at LSU*. As well, attention to some elements of FITS Recommendation IX: *Support LSU student use of IT* are valid for this Task Force, and user access and support concerns outlined in Recommendations II & III related to this area and should be addressed (perhaps in concert with the Infrastructure Task Force). Of course, issues that relate back to FITS Recommendation IV on sound fiscal planning may apply to this area as well.

Research Enablement – Primary focus should be on FITS Recommendation VI: *Develop robust and plentiful IT resources to enable research at LSU*. Here again, issues for this Task Force will extend into those of Recommendation IV on sound fiscal planning, as well as elements of Recommendation I on building a solid foundation of IT infrastructure (specifically as it relates to Frey's ability to house research-enabling IT, for example).

Infrastructure – The broadest area of focus falls to this Task Force, with interest spanning the first five FITS Recommendations – sound infrastructure, increasing accessibility to IT infrastructure and services, developing a robust support enterprise, funding, and security and policy.

Information Systems – Primary focus should be on FITS Recommendation VII: *Develop sound information systems featuring a rich set of applications and tools that address the increasing need for more effective and efficient institutional processes and provide for advanced academic analytics at LSU.* Given that information systems support more than just “traditional” administrative functions, there are opportunities for collaborative engagement on such items as course management systems (purview of teaching & learning), as well as information systems that support research. IT security is especially critical for this Task Force, and there are elements of Recommendation V of interest, especially those involving the handling and management of data.

Let me now detail the specific charge elements for the Task Forces.

- 1. Reconstitute the respective Task Forces, using as a starting point membership in the 2005-06 FITS process.** Chairs should work closely with Sheri Thompson in the Office of the CIO, as well as with Randy Hall (ITS Faculty Liaison) in reaching out to involve *additional* faculty and staff, and feel free to engage directly with the Faculty Senate and Staff Senate leadership in this process (as well as with Student Government as mentioned above). Sheri can also be of assistance in interfacing with Student Government and student groups to engage students in these efforts. Chairs are free to administer their Task Forces as their judgment guides them, but it is encouraged that an ‘open door’ be the model, allowing additional members to join in the process as their interest and awareness of the process grows. Task Forces should be kept manageable in terms of size, so that deliverables are achieved – but a fine balance must be achieved between expediency of results and breadth of engagement. The choice of faculty and librarians for the Chair positions recognizes their unique talents in achieving such balance.
- 2. Executive leadership of ITS should be closely involved in Task Force discussions, as it is through these individuals that action items will be implemented.** Each Task Force has a designated ‘Deputy CIO’ as an ex-officio colleague for the Chair – Dee Childs (Teaching & Learning), Charlie McMahon (Research Enablement), Cindy Hadden (Information Systems), and Ric Simmons (Infrastructure). Additional members of the Office of the CIO are available to all Task Forces, most especially: Brian Nichols, IT Security & Policy (Infrastructure – Security), Susan Crochet, IT Human & Financial Resources (Infrastructure – Funding), John Borne, IT Technical Advisor (all areas), and Ralph Boé, ExecDirector LOUIS (Infrastructure, Teaching & Learning). Sheri Thompson in her role as IT Communication & Planning Manager is a resource to all Task Forces. Other leadership and staff of ITS should be involved, also in ex-officio status, on all Task Forces. Deputies can help guide their inclusion.
- 3. Convene a full introductory session of each Task Force, and provide an overview of the process to the members.** The CIO is available to attend these ‘kick-off’ sessions to provide input and commentary from his perspective at the Chair’s invitation.

4. **Brainstorm and discuss implementation of relevant FITS action items, and for each chart a detailed implementation plan.** The FITS contains 84 individual action items across the ten recommendations. It is not the case that each action item requires a complicated and intricate implementation plan. Some are already being implemented; some are fairly straightforward and require a simple change in policy or the implementation of a simple process. It would be helpful if these items could be swiftly examined and dealt with, so that the majority of the focus will go into the more complex items.
5. **If necessary, develop subcommittees or focus groups to ‘go off’ and apply intense examination to certain key action items and return key finds to the Task Force for action.** The larger Task Forces can likely best move through their overall agendas if they can put into parallel the entire process of implementation discussion and planning, and let members who are specifically interested in select items to focus intensely on those items, bringing evolved thinking on these items back to the larger Task Force for conclusive recommendation.

These five steps should result in the assembly of an “implementation matrix” for every FITS action item. It is desired that this matrix be assembled no later than 1-March, 2007. The matrix may not contain ultimate specificity on each and every action item, but general directions for longer-term thinking should be in place. Subsequent to that:

6. **The Chairs and their counterpart Deputy CIOs and OCIO Officers should assemble implementation planning documents for final publication by 15-May, 2007.** The end result should be a collection of four (4) separate implementation plans which describe the process by which the entire FITS will be implemented. Again, some action items may be so complex and detailed as to require ongoing implementation planning that will extend well beyond 2007. These items should contain, in their implementation planning descriptions, discussion of the ongoing involvement of advisory roles of the Task Forces.
7. **Each implementation plan should be accompanied with a financial analysis of the resources required to complete implementation of the involved action items.** Costs should be assembled and a funding plan developed at three levels of implementation: Minimally Adequate, Adequate, and Full. Resources in the Office of the CIO’s Human & Financial Resources function will be put at the disposal of each Task Force Chair and Deputy CIO in accomplishing this aspect. *Specifically, this task will not fall to the broader Task Forces (though Chairs may involve their groups or select sub-sets if they so desire), but to the CIO, the Office of the CIO and ITS leadership, and the Task Force Chairs.*

Given the nature of funding cycles and opportunities inherent in the LSU environment, having visibility of these processes as they form will be critical. For example, it is very much the case that opportunities for use of surplus funds – whether from the State or internal to LSU – may arise as early as March 2007. It would be helpful if the CIO – with the full involvement and support of the Task Forces (via their Chairs) is positioned

with sufficient information to make ‘spot requests’ for such opportunities in a timely fashion. As a result, throughout the process, periodic meetings between Task Force Chairs and the CIO (either individually or as a group) will be arranged by Sheri Thompson.

Future of Task Forces

The CIO desires that the focused work of this round of Task Force engagement will be on developing a cohesive and supportable implementation plan for the FITS. Formal endorsement and acknowledgement of that plan through the various community governance and representative entities (Student Government, Faculty Senate, and Staff Senate) will be sought. It is through this ‘grass roots’ approach that we stand the best chance of advancing IT at LSU, rather than in a ‘top-down’ manner through administration; though such higher-level support will certainly be the outcome of this methodology.

The work of the Task Forces will not end with the completion of the formal FITS implementation plan. Rather, given that plan will require dedication and effort over the next 4-5 years to see it to fruition, continued engagement, input, communication, and support from the campus community will also be required to guide the process through the implementation plan. We live in a world that changes constantly, especially with regard to information technology. Thus, like the FITS, the FITS Implementation Plan must also be a flexible, “living” plan, one requiring a firm and engaged set of campus community “hands on the tiller.”

Because of this – and in support of FITS Action 10.01 – it is the intent of the CIO that these task forces will be a permanent and productive facet of IT management at LSU. We have completed the first step in developing the FITS. We will complete this second step in developing an implementation plan for the FITS. And through implementation, to its completion and maintenance in the years beyond, continuance of an insightful and involved campus community will be key to success.

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