Information Technology
Strategic Plan

2005-2008
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Creating World Class Support

In this digital age, technological change spares no school or company. The digital economy has transformed forever how we learn, teach, conduct our business, and serve our students.

Our students, faculty, staff, and alumni demand fast, easy, and ubiquitous information access. These mandatory requirements extend well beyond our physical campus. Wilkes must design secure systems that are accessible from any networked computer in the world for it to maintain and increase its competitiveness.

There is no debate that new technologies fuel learning, service, and productivity. Through proper planning and proficient execution, we can ensure a prosperous future by educating and providing our students, faculty, and staff about new information technology tools they need to succeed. We believe that Wilkes University, in partnership with Sungard Collegis, is well positioned to provide this essential ingredient to success.

The scope of the plan is beyond the information technology services provided by the institutional technology offices. The planning effort is institution-wide, with a focus on what Wilkes needs to “do” with technology rather than on what technology Wilkes needs to “buy.”

This information technology (IT) strategic plan will serve as a roadmap that allows us to chart a course toward key IT milestones. The IT strategic plan is intended to be a living document that is revised and updated but provides us with a roadmap to address our current challenges while moving toward our future. The goals of our IT strategic plan align with and support institutional strategic goals of strengthening our competitive advantage in undergraduate and graduate education to prepare students for fulfilling careers while enhancing programs and processes that support our academic and institutional success.

In the pages ahead, we describe Wilkes’ information technology strategy in great detail. This strategy is based on extensive work by the information technology advisory committee (ITAC) and members of the community. Each participant in the planning sessions deserves our gratitude as we strive to ensure that Wilkes is competitive and prosperous now and in the future.

Information Technology Strategic Planning Team

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Executive Summary

In order to continue the progress toward improving technology use and support, the institution found it valuable to take a fresh look at the technology directions that would be appropriate at Wilkes and so determined to develop this Information Technology Strategic Plan. This plan establishes the overall strategic direction for the University over the next three years, and provides the basis for directing the efforts of Collegis in supporting the University community.

The planning process was participative and collaborative, involving members of the Information Technology Strategic Planning Team (the ITSP Team), a cross-functional group representing various departments and administrative units. The Team met for three six-hour sessions to develop an IT Vision, Guiding Principles, Planning Assumptions, Goals, and Strategies.

The Vision statement below is a description of the ideal meant to guide Wilkes in its IT use. It is the overarching statement upon which all subsequent plan elements are based.

**Information Technology Vision**

*Wilkes….a click away*

Wilkes incorporates information technologies to fulfill goals articulated in the University Mission. Reliable, efficient, and universal access to and sharing of information within and beyond campus boundaries is central to providing effective technology services. Information technologies are adopted, integrated, and systematically upgraded to provide University constituents with the tools needed to achieve excellence.

**Guiding Principles**

Guiding Principles were also developed and are intended as parameters for decision-making. An analysis of the driving and restraining forces was then conducted, identifying those internal and external factors that impact what needs to be accomplished through the use of information technology.

1. Student learning and success are the central focal points for everything we do.

2. Reliability and dependability are essential characteristics that the University requires from information systems and services.

3. Information technology must support clear, easy-to-use, and efficient operational processes.

4. Faculty and staff professional development is critical to the effective and efficient use of university information technology resources.

5. Information technologies should enable innovation in teaching and learning, communications, and university operations.

6. Applications of information technology must support user needs and requirements.

7. Decisions about information technology resource allocations must be made in a collaborative manner with appropriate participation of individuals throughout the University.

8. Support services for information technology must continue to be appropriately and efficiently organized to provide flexible and reasonable levels of assistance to all constituencies.
Information Technology Goals for 2005-2008

The following Goals and Strategies followed from this analysis.

1. **Infrastructure** – The University will be supported by a reliable, secure, integrated, and industry-standard infrastructure that is appropriate to the institutional mission.

2. **Communications** – University constituencies will have access to information regarding institutional plans, operations, and events through technology-enabled communication methods.

3. **Information Access & Use** – Faculty and staff will have access to relevant institutional information and will possess the knowledge and skills to use the information effectively.

4. **Educational Technology** – Students will have access to a learning environment that provides technologically enhanced programs, responds to varying learning styles, and supports multiple delivery methods.

5. **Technology Support** – Clients of Information Technology Services will express a high level of satisfaction with IT support services.

6. **Faculty & Staff Development** – Information Technology professional development, knowledge sharing, and collaboration will be valued, encouraged, and supported.

7. **Planning** – The University will have a planned approach to the implementation, maintenance, and support of information technologies.
Background

In January and February 2003, Wilkes University’s Instructional Technology Steering Committee conducted a survey of faculty regarding their use of information technology (IT). The purpose of the survey was to gather information to assist in the development of an IT plan that would guide future development of technology at the University. In March of that same year the Comprehensive Technology Master Plan was created; it outlined a number of goals and initiatives to address the perceived information technology needs at Wilkes.

In April 2004, after a year in which minimal progress was made toward achieving the goals of the technology master plan, Wilkes entered into a contract for information technology management services with SunGard Collegis (Collegis). At that time, the Chief Financial Officer (CFO) outlined four primary goals for information technology at the University:

- Use technology to enhance learning and deliver instruction.
- Use the University Web site as an effective tool for external and internal communication.
- Use technology to make business and operation processes efficient and effective.
- Use technology to enhance personal control of the community in their interactions with the University and services.

These four goals established the immediate charge for Collegis as the company and the University established their working relationship.

In order to continue the initial progress toward improving technology use and support, the institution found it valuable to take a fresh look at the technology directions that would be appropriate at Wilkes and so determined to develop this Information Technology Strategic Plan. This plan establishes the overall strategic direction for the University over the next three years, and provides the basis for directing the efforts of Collegis in supporting the University community.

The planning process was participative and collaborative, involving members of the Information Technology Strategic Planning Team (the ITSP Team), a cross-functional group representing various departments and administrative units. The Team met for three six-hour sessions to develop an IT Vision, Guiding Principles, Planning Assumptions, Goals, and Strategies.
Envisioning the Future

Wilkes envisions a future when all of its basic information technology support needs are fully met including the ability for experimentation with and implementation of advanced learning technologies. There is a strong, common desire to have a stable infrastructure with a well defined architecture that will allow for integration between the diverse components of the institution’s application portfolio. At a very basic level, the institution envisions a time when services, such as e-mail, group calendaring, and World Wide Web access, are utilized across the institution and reliably available from both on and off campus. At a somewhat higher level, the institution envisions a time when educational and administrative software applications are integrated, information flows between them seamlessly, and faculty and staff have full and easy access to all information needed to do their jobs.

Though there is a definite focus on basic needs, Wilkes also looks forward to using technology in new ways to enhance student learning. Faculty are interested in using technology to expand and enhance traditional learning methods and in using online instruction to better meet the learning objectives of students who must balance their pursuit of a higher education with the many other competing demands on their time. Along with this desire to create a technologically enhanced learning environment, faculty and academic administration also desire to maintain effective, high-quality educational programs that prepare students for full and productive lives.

To realize our vision, the University envisions creating a culture that values and encourages faculty and staff development and directs resources to that end. Employee development programs will include ongoing opportunities for faculty and staff to share experiences and to collaborate in the development of new approaches to learning and institutional services. Faculty will also collaborate with peers at other institutions to develop learning opportunities for students that would not be possible without a partnership.

Having described this “future state” scenario in these terms, the Information Technology Strategic Planning Team (the ITSP Team) captured the essence of the future use of technology at Wilkes in the IT Vision Statement and Guiding Principles that follow.
The Basis for Decision-Making

*Information Technology Vision Statement*

With the development of an IT Vision Statement, it is the intent of Wilkes to provide a common picture of the future use of technology within the institution. This Vision is a description of an ideal state toward which Wilkes strives as well as a broad statement that defines the parameters for future technology decision-making. It is a tool that all constituencies can use to map the future of technology at Wilkes and to make progress toward accomplishment.

The ITSP Team did not develop this IT Vision in a vacuum. It kept in mind the Vision and Mission of the University and the unique characteristics of the institution that distinguish it from others in the state and region. Through purposeful alignment with the institutional Vision and Mission, the ITSP Team ensured that the entire University community could move forward in the same technological direction.

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Institutional Vision

Wilkes University will build its future on its historic commitment to students, a belief in the integrity and shared purpose of all who comprise the Wilkes family, and the continuation of its vital relationship with the land and people of Northeastern Pennsylvania.

By 2010, Wilkes University will distinguish itself as an institution that provides a vital, general education core experience for all undergraduate students—a core that combines challenging academics, meaningful co-curricular activities, and experiential learning in an interconnected undergraduate experience. All Wilkes students will have the individual attention, mentorship, and support they need to set high educational goals and exceed them—accomplishments that students will be asked to reflect on. Their confident, enterprising spirits, enthusiastic engagement with the challenges of work and life, intellectual resourcefulness, and civic responsibility will distinguish Wilkes students. Additionally, they will learn in a rich multicultural environment that reflects the region Wilkes serves. In turn, they graduate ready to take their place as informed citizens in the global community.

Extrapolating its vision for the undergraduate experience into the post-baccalaureate arena, Wilkes seeks to become a regional resource for lifelong learning in the Mid-Atlantic region, delivering its brand of individualized education in highly accessible ways. By developing a strong portfolio of programs for post-baccalaureate students, with a focus on the needs of Wilkes’ alumni and based on the University’s academic strengths, Wilkes will serve as an intellectual hub, helping people succeed in a changing world and strengthening its own financial position.

Institutional Mission

Wilkes University is an independent institution of higher education dedicated to academic and intellectual excellence in the liberal arts, sciences, and professional programs. The University provides its students with the experience and education necessary for career and intellectual development as well as for personal growth, engenders a sense of values and civic responsibility, and encourages its students to welcome the opportunities and challenges of a diverse and continuously changing world. The University enhances the tradition of strong student-faculty interactions in all its programs, attracts and retains outstanding people in every segment of the University, and fosters a spirit of cooperation, community involvement, and individual respect within the entire University.
Wilkes University Information Technology Vision

Wilkes….A click away

Wilkes incorporates information technologies to fulfill goals articulated in the University Mission. Reliable, efficient and universal access to, and sharing of, information within and beyond campus boundaries is central to providing effective technology services. Information technologies are adopted, integrated and systematically upgraded to provide University constituents with the tools needed to achieve excellence.

Information Technology Guiding Principles

Making progress toward the ideal information technology state as defined in the IT Vision statement requires making numerous difficult decisions and choices. Because future decisions and choices should not take place in isolation of what is being accomplished in other areas or functions of the institution, the ITSP Team sought to develop standards that could be used to assist in the decision-making process.

The purpose of developing IT Guiding Principles is to reflect how institutional members should relate to one another, how they should operate, and how they should compete in terms of technology throughout the organization. In addition, these IT Guiding Principles are in alignment with the University’s Values and lend support and definition to the mission of the institution.

As decisions are required, the Principles are designed to help guide actions when choices are not clear. They are meant to provide a context for consistent decision-making that is not just focused on doing things right, but on doing the right thing.

Information Technology Guiding Principles

1. Student learning and success are the central focal points for everything we do.
2. Reliability and dependability are essential characteristics that the University requires from information systems and services.
3. Information technology must support clear, easy-to-use, and efficient operational processes.
4. Faculty and staff professional development is critical to the effective and efficient use of university information technology resources.
5. Information technologies should enable innovation in teaching and learning, communications, and university operations.
6. Applications of information technology must support user needs and requirements.
7. Decisions about information technology resource allocations must be made in a collaborative manner with appropriate participation of individuals throughout the University.
8. Support services for information technology must continue to be appropriately and efficiently organized to provide flexible and reasonable levels of assistance to all constituencies.
An analysis of the driving and restraining forces was then conducted, identifying those internal and external factors that impact what needs to be accomplished through the use of information technology. The following Goals and Strategies followed from this analysis.

**Information Technology Goals for 2005-2008**

1. **Infrastructure** – The University will be supported by a reliable, secure, integrated, and industry-standard infrastructure that is appropriate to the institutional mission.

2. **Communications** – University constituencies will have access to information regarding institutional plans, operations, and events through technology-enabled communication methods.

3. **Information Access & Use** – Faculty and staff will have access to relevant institutional information and will possess the knowledge and skills to use the information effectively.

4. **Educational Technology** – Students will have access to a learning environment that provides technologically enhanced programs, responds to varying learning styles, and supports multiple delivery methods.

5. **Technology Support** – Clients of Information Technology Services will express a high level of satisfaction with IT support services.

6. **Faculty & Staff Development** – Information Technology professional development, knowledge sharing, and collaboration will be valued, encouraged, and supported.

7. **Planning** – The University will have a planned approach to the implementation, maintenance, and support of information technologies.
Aligning IT and Institutional Goals

Wilkes University Strategic Initiatives 2010

1. Develop a balanced blend of exceptional academic programs in the undergraduate and post-baccalaureate sectors, focusing on the sciences and the professions to increase Wilkes' competitive advantage and to expand its reach beyond Northeast Pennsylvania.

2. Develop an exceptional support environment. Focus Wilkes’ support activities on providing world-class services to students, faculty, staff, and alumni. For key programs, the standard will be to meet or exceed the performance of Wilkes’ most successful competitors.

3. Develop substantial financial and institutional strength to support Wilkes’ growth and agility by 2010.

Operational Plans

This IT strategic plan focuses attention on how information technology can and should be used to further the Wilkes University Mission and long-range goals. However, in order for this process to be truly successful, the University must be able to “operationalize” this plan on an annual basis. This will require the development of tactical plans that are specifically tied to IT goals and strategies.

The implementation matrix that follows contains a column that indicates the individual(s) who has major responsibility for implementation of each of the IT strategies. Typically, it will be this person(s) who is responsible and accountable for the development of annual operating plans, including appropriate budget requests for each of the assigned strategies and for ensuring that progress is being made toward the implementation and completion of strategies.

Yearly Review and Update

Annually, the University should review the internal and external environment in which Wilkes operates and update the planning assumptions. Progress toward accomplishment of the goals and strategies should also be measured. After the planning assumptions are current and goals and strategies are assessed, modifications that reflect these changes should be made as needed to the implementation matrix and to subsequent operational plans.
Implementing Strategic Objectives

The ITSP Team focused attention on how information technology can and should be used to further the University Vision, Values, Mission, and Goals in the development of the implementation matrix that follows. The implementation matrix below contains information that will better ensure that the IT Goals of Wilkes will be accomplished. The terms defined below constitute a helpful key to interpreting the matrix:

- **Goals** are strategic-level targets.
- **Key performance indicators** identify completion characteristics or milestones of progress for goals. They answer the question, “How will we know when we have achieved the goal?”
- **Strategies** associated with each goal identify implementation actions.
- **Dependencies** are those events or environments that must take place or be in existence before implementation of a strategy can begin.
- **Responsible Party** identifies the individual, department, or council that has major responsibility for accomplishment of each of the IT strategies. Typically, it will be the responsibility of these individuals or groups to develop the annual operating plans and to appropriate budget requests for each of the assigned strategies as well as more detailed project plans. Where multiple owners are listed, the first individual or group listed has primary responsibility for ensuring the implementation of the strategy.
- **FY columns** show the implementation timeline. An “X” placed in any single FY column indicates completion of a task in that year. X’s in multiple FY columns indicate multi-year efforts.
- **Progress** is to be documented as implementation of the strategies occurs.
- **Resource Development Potential** is a list of areas of resource development that have been identified for institutional strategies that align with grant opportunities in the federal, state, corporate, and private sectors.
**Goal 1: Infrastructure – The University will be supported by a reliable, secure, integrated and industry standard infrastructure that is appropriate to the institutional mission.**

**Key Performance Indicator(s): User satisfaction, Status Reports, Maintenance & Repair Records**

<table>
<thead>
<tr>
<th>STRATEGIES</th>
<th>DEPENDENCIES</th>
<th>RESPONSIBLE PARTY (Owner)</th>
<th>FY 05-06</th>
<th>FY 06-07</th>
<th>FY 07-08</th>
<th>PROGRESS/ACCOMPLISHMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Redevelop the university network to meet or exceed industry standards for reliability, security, interoperability and integration.</td>
<td>Adoption of standards</td>
<td>CIO</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2 Provide appropriate network connectivity to all campus facilities.</td>
<td>Standards</td>
<td>CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>1.3 Provide appropriate remote network access capabilities.</td>
<td></td>
<td>CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Goal 2: Communications – University constituencies will have access to information regarding institutional plans, operations and events through technology enabled communication methods.

<table>
<thead>
<tr>
<th>STRATEGIES</th>
<th>DEPENDENCIES</th>
<th>RESPONSIBLE PARTY (Owner)</th>
<th>FY 05-06</th>
<th>FY 06-07</th>
<th>FY 07-08</th>
<th>PROGRESS/ACCOMPLISHMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 Develop technology-based communication methods that promote effective communications.</td>
<td>1</td>
<td>VP Enrollment &amp; Marketing, CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>2.2 Provide training &amp; development in the use of adopted communication methods.</td>
<td></td>
<td>VP Human Resources</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>2.3 Periodically assess the effectiveness of technology based communication methods and adjust accordingly.</td>
<td>Baseline assessment</td>
<td>Executive Director of Information Analysis &amp; Planning</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Goal 3: Information Access & Use – Faculty and staff will have access to relevant institutional information and will possess the knowledge and skills to use the information effectively.

Key Performance Indicator(s): Training and development contact hours, utilization statistics, amount of information in archives

<table>
<thead>
<tr>
<th>STRATEGIES</th>
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<th>RESPONSIBLE PARTY (Owner)</th>
<th>FY 05-06</th>
<th>FY 06-07</th>
<th>FY 07-08</th>
<th>PROGRESS/ACCOMPLISHMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1 Develop an effective data management and reporting environment.</td>
<td>President’s Cabinet, CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3.2 Integrate academic and administrative information systems.</td>
<td>CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3.3 Provide adequate and relevant training and development to faculty and staff in contributing to, using and disseminating institutional information.</td>
<td>VP Human Resources</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3.4 Develop an effective method for managing and coordinating room and event scheduling.</td>
<td>Provost, CFO, CIO</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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</tbody>
</table>
**Goal 4: Educational Technology – Students will have access to a learning environment that provides technologically enhanced programs, responds to varying learning styles, and supports multiple delivery methods.**

**Key Performance Indicator(s):** Student satisfaction, annual program review, faculty survey

<table>
<thead>
<tr>
<th>STRATEGIES</th>
<th>DEPENDENCIES</th>
<th>RESPONSIBLE PARTY</th>
<th>FY 05-06</th>
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<th>FY 07-08</th>
<th>PROGRESS/ACCOMPLISHMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1 Create a strategy for the appropriate use of alternative delivery methods in program development.</td>
<td>Provost, Deans, CIO</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.2 Create a student-centered learning environment that fully utilizes technology resources to assess and respond to various student learning styles.</td>
<td>Provost, CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.3 Provide resources to enhance existing programs through the integration of appropriate technologies.</td>
<td>Provost, CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4 Develop model graduate and post-baccalaureate programs with emphasis on alternative delivery methods.</td>
<td>Provost, Deans, CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.5 Develop a strategy for students to achieve proficiency with information technology tools.</td>
<td>Provost, VP Student Affairs</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.6 Determine appropriate information technologies for all learning spaces.</td>
<td>Provost, VP Student Affairs, CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Goal 4: Educational Technology – Students will have access to a learning environment that provides technologically enhanced programs, responds to varying learning styles, and supports multiple delivery methods.

**Key Performance Indicator(s):** Student satisfaction, annual program review, faculty survey

<table>
<thead>
<tr>
<th>4.7</th>
<th>Provide education and motivators for faculty and staff to engage in the use of technology supported alternative delivery methods.</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.4</td>
<td>X</td>
</tr>
</tbody>
</table>

| 4.4 | Provost, VP Human Resources | X | X | X |
Goal 5: Technology Support – Clients of Information Technology Services will express a high level of satisfaction with IT support services.

Key Performance Indicator(s): User satisfaction, annual program review, work order statistics, up-time statistics

<table>
<thead>
<tr>
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<th>DEPENDENCIES</th>
<th>RESPONSIBLE PARTY (Owner)</th>
<th>FY 05-06</th>
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<th>FY 07-08</th>
<th>PROGRESS/ACCOMPLISHMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1 Provide adequate support for technology initiatives.</td>
<td></td>
<td>CFO, CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5.2 Develop and maintain a proactive IT support team.</td>
<td></td>
<td>CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5.3 Solicit user feedback on support quality and needed improvements.</td>
<td></td>
<td>CFO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5.4 Create and implement a planned replacement program for Information Technology systems.</td>
<td>Adoption of standards Current inventory</td>
<td>CFO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5.5 Create, maintain and execute operational and project specific ITS communication plans.</td>
<td></td>
<td>CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5.6 Provide faculty and staff with appropriate information technology tools to perform their jobs.</td>
<td></td>
<td>CFO, CIO</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
**Goal 6: Faculty & Staff Development – Information Technology**

Professional development, knowledge sharing and collaboration will be valued, encouraged and supported.

**Key Performance Indicator(s):** Faculty survey, professional development contact hours, annual program review

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>6.1 Develop a strategy for faculty and staff to achieve proficiency with information technology tools.</td>
<td>6.1</td>
<td>VP HR</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.2 Provide opportunities for faculty and staff to acquire the information technology knowledge and skills necessary to effectively perform their jobs.</td>
<td>6.1</td>
<td>VP HR</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>6.3 Establish learning communities that maximize the individual and collective resources of members.</td>
<td>Chairs of Instructional Technology &amp; Administrative Process Committees</td>
<td>X</td>
<td>X</td>
<td>X</td>
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</tbody>
</table>
Goal 7: Planning – The University will have a planned approach to the implementation, maintenance and support of information technologies.

**Key Performance Indicator(s):** Existence of plans, plan status updates.

<table>
<thead>
<tr>
<th>STRATEGIES</th>
<th>DEPENDENCIES</th>
<th>RESPONSIBLE PARTY</th>
<th>FY 05-06</th>
<th>FY 06-07</th>
<th>FY 07-08</th>
<th>PROGRESS/ACCOMPLISHMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1 Maintain an information technology strategic plan that is responsive to dynamic university needs.</td>
<td></td>
<td>CFO</td>
<td>X</td>
<td>X</td>
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</tr>
<tr>
<td>7.2 Develop annual information technology operations plans to implement initiatives from the IT strategic plan.</td>
<td></td>
<td>CFO</td>
<td>X</td>
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<tr>
<td>7.3 Identify best-of-class practices in the use of information technology for providing services and delivering education and incorporate into institutional strategies.</td>
<td></td>
<td>CIO</td>
<td>X</td>
<td>X</td>
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</tbody>
</table>
**Goals Alignment**

The table below shows the alignment of the Information Technology Strategic Goals with the Strategic Goals of Wilkes University. The full text of the institutional initiatives, goals and strategies follow the table. The IT goals and strategies can be found in their entirety in the Implementation Grid.

<table>
<thead>
<tr>
<th>University Initiatives</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
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<tr>
<td>1</td>
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<td>Develop a balanced blend of exceptional academic programs.</td>
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<th>7</th>
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<td>2</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
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<td>X</td>
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<td>Develop an exceptional support environment.</td>
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<tr>
<td>3</td>
<td>X</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>Develop substantial financial and institutional strength.</td>
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</table>
Behind the Scenes

**A Dynamic Planning Process**

IT strategic planning is intended to be more than a one-time event. Rather, it is meant to be long-term yet reviewed annually so that current situations may be reflected in plan updates. Through a planning process that is cyclic in nature, the institution describes the educational and operating environment, articulates future directions and initiatives, and identifies technology strategies for achieving desired goals. The scope of the plan is beyond the information technology services provided by the institutional technology offices. The planning effort is institution-wide, with a focus on what Wilkes needs to “do” with technology rather than on what technology Wilkes needs to “buy.”

A cross-functional team of faculty and staff met over a one-month period to develop Wilkes’ *Information Technology Strategic Plan* for 2005-2008 following the cycle illustrated below.
Planning for Information Technology

Wilkes made a commitment to further development and enhancement of its IT services and support in April of 2004, when the Board of Trustees approved entering into a contract with SunGard Collegis to provide information technology management services. At that time, four goals were established to guide the strategic direction for IT Services. The four initial goals were to be:

- Use technology to enhance learning and deliver instruction.
- Use the University Web site as an effective tool for external marketing and internal communication.
- Use technology to make business and operation processes efficient and effective.
- Use technology to enhance personal control of the community in their interactions with the University and services.

These four statements of direction were intended to guide technology development and support until a more comprehensive institutional planning process could be initiated.

In December of 2004, the IT Governance Committee had an initial meeting with a planning facilitator from SunGard Collegis to discuss a planning process and to determine who should be involved in the development of the Information Technology Strategic Plan. It was determined that the committee would be augmented with additional members of the faculty to comprise an Information Technology Strategic Planning Team, and a series of six-hour planning sessions was agreed upon and scheduled.

During the months of January and February of 2005, the ITSP Team met for three six-hour facilitated sessions to develop the Information Technology Strategic Plan that follows.

Strategic planning is a process that seeks to clarify what an organization is, what it wants to be, and how, specifically, the organization can successfully make the transition. A strategic technology plan provides technology directions and a management strategy within the context of changing internal and external environments while it sets the philosophy and direction for the use of information technology within the institution.

Planning Methodology

The specific planning process used for development of the Information Technology Strategic Technology Plan is a modification of the organizational transition methodology described in Organizational Transitions by Beckhard and Harris. This methodology is based upon the principle that:

> a core dilemma for executives and leaders is how to maintain stability in their organizations and, at the same time, provide creative adaptation to outside forces; stimulate innovation; and change assumptions, technology, working methods, roles and relationships, and the culture of the organization itself. (Ibid, p. 1)

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The planning approach that has been adapted for use by Wilkes University—also from the methodology proposed by Beckhard and Harris—requires the following steps:

- Development of a “future state” vision of how the use of information technology, in its broadest definition, should add value in support of the University vision, mission, and goals.
- Development of planning assumptions that details the environment in which the University currently exists.
- Development of guiding principles that should govern the decisions and actions of the organization and are aligned with the mission and goals of the institution.
- Development of goals and strategies, aligned with the institutional vision, mission, and goals, to enable the University to move forward toward its desired “future state” in accordance with the guiding principles.

**Planning Assumptions**

Planning assumptions represent what the ITSP Team believes to be true about the current environment at Wilkes. These assumptions are based upon the observations and opinions of the planning team, and are intended to describe the current internal and external environmental factors that are driving or restraining development and implementation of Wilkes’ Information Technology Strategic Plan. In making this assessment, Team members reflected on the existing and anticipated student population, the faculty, administration and staff, technologies, facilities, and the physical resources of the University. They identified and drafted planning assumptions in light of trends they foresee as well as new developments they anticipate.

**Driving Forces**

- The desire to improve student learning and success is driving new uses of technology.
- Competition from other institutions is driving the university to expand its use of technology in all aspects of education and institutional services.
- Students come to campus with expectations for what technologies will be available to them.
- Leadership is committed to providing and using technology and technology support.
- Rapid change in technology capabilities creates pressure to keep pace with that change.
- Faculty technology innovators motivate others to adopt similar practices.
- Regulatory agencies have put an emphasis on technology and have adopted rules which change the way we deploy and use it.
- Employer expectations for student skills at graduation are creating a demand for greater use of technology in our programs.
- Competing demands (family, jobs, location) are motivating us to use technology to deliver education and services.
- Students, faculty and staff have a consumer mindset that requires that we adopt technology to deliver education and services.
• Resource constraints require the University to seek ways to leverage technology to create greater efficiency.

• Institutional constituencies on and off campus expect information technologies to enable better communication.

• Expectations for better service, both from institutional processes and technology support, are driving technology development.

**Restraining Forces**

• Insufficient technology support prevents faculty from achieving the promise of information technology as an educational delivery tool.

• The current network infrastructure limits opportunities for development.

• Technology support organization responsiveness is limiting the effectiveness of technology support.

• Technology changes more rapidly than the institution can respond to the change.

• Revenue limits resources available for technology.

• There are skill gaps – large variations in abilities – that limit effective deployment and use of resources.

• Unwillingness to change impacts our agility.

• The IT infrastructure is not fully developed.

• Age and construction of the buildings complicates the deployment of technology.

• Systems, networks, and e-mail are inadequately protected and are vulnerable to attack.

• There is a resistance to technology standards.

• Some staff and faculty are uncomfortable with the institution’s decision to outsource technology support.

• The municipal infrastructure complicates and limits what we can do.
Preparing for Planning

Members of the ITSP Team began the planning process by acquainting themselves with current technology trends in higher education. The references below were provided as a way of stimulating thinking about technology planning through reading and research.

Abbreviated suggested readings and resource sites:

- EDUCAUSE guide to Evaluating Information Technology on Campus, [www.educause.edu/consumerguide/](http://www.educause.edu/consumerguide/)
Who Participated

The ITSP Team members represent various departments and administrative units within the institution. It is this cross-functional team composed of faculty and staff that developed Wilkes' *Information Technology Strategic Plan for 2005-2008*.

The Planning Team

Mark Allen .......................................................................................................................... Student Affairs
Scott Byers ....................................................................................................................... Finance and Support Operations
Darin Fields ..................................................................................................................... Humanities and Social Sciences
Mike Frantz ..................................................................................................................... Admissions
Sid Halsor ............................................................................................................... GeoEnvironmental Sciences and Engineering
Harvey Jacobs ........................................................................................................... Nesbitt College of Pharmacy and Nursing
Ken Klemow ............................................................................................................... Biology
John Koch ...................................................................................................................... Mathematics & Computer Science
Maravene Loeschke ................................................................................................. Provost’s Office
Barbara Loftus ............................................................................................................... Provost’s Office
Jane-Ellen Miller ........................................................................................................ Client Services, SunGard Collegis
Barb Moran .................................................................................................................. Graduate Teacher Education
Josephine Panganiban ............................................................................................... Human Resources Development
Michael Salem ........................................................................................................... CIO, SunGard Collegis
Don Shandler ............................................................................................................... Graduate Studies
Margaret Steele ............................................................................................................. Center for Continued Learning
Mike Reid2 .................................................................................................................. Strategic Services, SunGard Collegis
Cheryl Dettrick3 .......................................................................................................... Strategic Services, SunGard Collegis

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2 Planning facilitator
3 Resource Development Consultant