INFORMATION SERVICES & TECHNOLOGY

STRATEGIC PLAN

2016 – 2020

Empowering the University community through information technology excellence and stewardship.
A Message from the Vice-Provost & AVP IST

IST will continue on this path to meet the challenges facing the institution to ensure a responsive, secure and effective IT capability.

The University’s central IT capability has developed substantially with the recent consolidation, improving performance by reducing cost, increasing quality, and meeting the increasing demand for IT services to support strategic institutional objectives. IST will continue on our path to meet the challenges facing the institution and ensure a responsive, secure, and effective IT capability.

The provision of IT services will be required to keep pace with new technological developments; for example, delivery methods such as cloud and software as a service require fresh approaches to service design, acquisition, implementation, and operation.

The growing application of IT in academic and student support presents a mixture of new and existing challenges, including the best technology mix for computer labs and classrooms, research computing, online course delivery, user-preferred devices, and mobile accessibility. Student experience will be improved through greater integration of systems and processes to improve the range, depth, and speed of service they experience.

In conjunction with these is the growing use of analytics for student learning, academic management, data research, and institutional performance. IST in response will concentrate its attention on technology with a renewed focus on the gathering, storing, and analysis of information.

Institutional IT governance is a fundamental underpinning to providing the community the wherewithal to make effective decisions regarding the appropriate investments in technology and the ability to evaluate the performance of the IT portfolio. IST will continue to establish effective governance in collaboration with the community.
Vision

To inspire the human spirit through outstanding achievements in learning, discovery, and citizenship in a creative community, building one of the world’s great universities for the public good.

Mission

Our mission is to empower the University community through information technology excellence and stewardship. We will provide a vital informational and technologically enabled environment that inspires innovative thinking, continuous development, advanced learning, and generative research.

Values

IST values diversity, inclusivity, and equity across and among our staff. Through our hiring and development practices, we actively support the institutional goal of building a diverse, inclusive community of exceptional students, faculty, and staff from Alberta, Canada, and the world. We recruit and support the development and promotion of all qualified persons, including women; First Nations, Métis and Inuit persons; members of visible minority groups; persons with disabilities; persons of any sexual orientation or gender identity and expression; and all those who may contribute to the further diversification of ideas and the University.
The availability of quality IT services is a critical enabler of all activities of the University of Alberta community identified in the Institutional Strategic Plan (ISP). We define Reset as the re-evaluation of our existing services to assess areas of under- and over-provision and to determine where improvements can be made in the delivery of services. The initial thrust of the strategic plan will be on evaluating and making changes to IST services and processes to attain a sustainable footing.

The approach IST adopted to address the known and yet-to-come challenges is to follow four strategic themes through three phases of differing emphasis. The themes described here both reflect and are responsive to the challenges we face and the differing degrees of effort required to address these challenges.
The third strategic phase will place a greater emphasis on the computational and informational needs of the academic community to meet the anticipated growth in service requirement. Building on the themes of sustainability and transparency, the increased focus on teaching, learning, and research will create an informational milieu that promotes generative research, supports student success, and empowers teaching innovation.

Reshape
Develop the Engine

IST must maintain an ongoing review of the services we deliver and new capabilities required by the University. This is required to keep current with the changing business needs of the University community and advances in technology. IST’s focus in this phase will be on the two key components of service provision, fit for need and fit for purpose, to identify and deliver valued services to the community.

Refocus
Drive in a New Direction
Step One

**Sustainability**

*The need to achieve and maintain a sustainable operating base is a prerequisite for all IST activities.*

The need to address technical debt and ensure operational effectiveness and financial and technological health is of paramount importance that not only frames the early activities of the plan, but is a constant theme over its entire duration.

This is not a simple task, however, and requires careful analysis before any decisions are made regarding our service catalogue. The IT Financial Management and service evaluation work being undertaken will provide a basis for this analysis and allow a cost comparison of our services against alternative providers. This will assist us in finding the appropriate balance between internal and external service provision, allowing IST to focus on the essential services that it is best positioned to provide.
To ensure IT services are sustainable, we will:

- Develop services that are used, needed, and valued
- Optimize services to balance the service expectation for the customer and IST
- Deliver services at the appropriate level of quality and availability
- Provide services that are cost effective
- Develop services with an agreed funding model
- Ensure service lifecycles are understood and managed
- Standardize services with approved exceptions
- Mitigate the risk of deferred maintenance
- Balance IST’s budget with an allowance for growth

Sustainability strategic theme links to Objectives 21, 22, 23 in *For the Public Good* Institutional Strategic Plan
Step Two

Transparent Value

The University community requires ongoing input to and assessment of the IT services it receives.

The engagement of the community is essential to develop an environment of mutual understanding and trust supported by effective IT governance structures. In addition, IST’s service delivery will need to adapt to the identified needs of the community and to the ongoing affordances of technological developments.

Critical to demonstrating transparent value for money is a deep understanding of our clients. Providing services without understanding how they are used or what problems they solve does not allow us to effectively develop our service catalogue or make appropriate technology investments. We need to engage our clients to gain insight into their business issues and organizational needs before we respond with a technological solution. In addition, we need to implement technological solutions that are smart. By this we mean that the service will provide information about its own usage that facilitates improved lifecycle decision making.
To demonstrate transparent value, we will:

- Build proactive client engagement and reporting
- Implement IT Governance
- Create mechanisms to measure the constituents’ view of the right level of the service
- Align services to constituent needs, based on evidence
- Align projects to institutional strategy with observable quantitative metrics
- Measure the effect of project/outcome metrics to overall strategic direction
- Ensure cost vs. value for the constituent is understood and articulated
- Ensure constituents can select their position on the cost vs. value curve
- Benchmark services with relevant comparators

Transparent Value strategic theme links to Objectives 1, 5, 6, 18 in *For the Public Good* Institutional Strategic Plan
Step Three

Process Improvement

The enabling powers of IT are significant; however, they need to be harnessed appropriately and effectively.

Whether accompanying an IT-enabled change or a process improvement, organizational change and process renewal are essential accompanying components to performance improvements. Improvements in IST and institutional performance will result from process renewal and the adoption of specific organizational approaches to ensure optimal value from our clients’ perspectives.

This desire for process renewal is overlaid with the accompanying need to ensure appropriate task assignment and to ensure technical staff are not undertaking unnecessary or inefficient overhead activities. To this end, we have started a Lean initiative to continually improve how we do business. The approach here is to go slowly at first to learn the ropes and then move more purposefully. The skills and experience we gain can then be used across the University to improve processes and operating performance.
To optimize operational effectiveness, we will:

- Apply methods such as Lean and user-focused approaches to process renewal
- Implement OCM and Benefits Realization for better collaboration and understanding
- Implement budget accountability at a unit level
- Implement service automation, monitoring, and reporting
- Adopt constituent lifecycle planning
- Develop and apply portfolio management for both projects and services

Process Improvement strategic theme links to Objectives 1, 5, 21 in For the Public Good Institutional Strategic Plan
Step Four

Teaching, Learning, and Research

The enriching relationship of technology with teaching, learning, and research requires IST to respond and to gain a greater understanding of the needs of instructors, researchers, and students.

The accelerating developments and expectations of educational technology to enhance teaching and research and the broader student experience present a significant opportunity for IST to work with the academic community to use technology to best effect.

To effectively move the University to an integrated environment of learning and research technologies, tools and services, IST needs to adapt its service model. More specifically, IST needs to provide foundational support services, assist in the governance, and collaborate in the development of an ecosystem that supports academics and students to achieve their educational goals. The ecosystem needs to efficiently support the interconnection of internal and external learning, research, and administrative systems to ensure a seamless experience.
To enhance teaching, learning, and research, we will:

- Assess, define, and implement a renewed Teaching & Learning Technology ecosystem
- Assess, define, and implement a renewed Research Technology ecosystem
- Support existing teaching and learning technologies
- Support existing research information technologies
- Motivate and support an institution-wide discussion of the student lifecycle and the researcher lifecycle and use the outcomes of those discussions to guide technology investments

Teaching, Learning, and Research strategic theme links to Objectives 7, 10, 13, 14, 18 in *For the Public Good* Institutional Strategic Plan
Throughout the strategy

Grow Our People

Underpinning all of IST’s strategy is the constant need to grow our people.

The need to achieve sustainability, improve processes, develop and demonstrate transparent value, and sustain the growth of our learning and research services requires the constant need to grow our people. This can only be achieved through the ingenuity and empowerment of our people. It is essential that we increase our knowledge in the acquisition, management, and application of new technologies and processes to enable the institution to achieve its strategy and thereby support the institution’s strategic plan.

The four strategic themes will guide the technological, methodological, business, and interpersonal growth of IST staff. The strategic focusing of our activities will enable the understanding of our skill needs and the provision of corresponding career pathways for our staff. The skill sets required will be gained through training, professional development, experience from work assignments, and a continual exposure to development opportunities.
To invest in and grow our people for the changing environment, we will:

- Acquire, retain, and manage talent
- Create career and experience opportunities for staff
- Facilitate professional and leadership development
- Provide training for improved performance and job changes
- Engage, inform, and include staff in IST direction setting and strategic performance reviews

Grow Our People strategic theme links to Objectives 5, 15, 23 in *For the Public Good* Institutional Strategic Plan
Connecting to the Institutional Plan

The challenge of managing the ongoing change of technology and its effective application within the University requires a fresh approach. In response, IST has adopted a more agile strategic planning approach.

The execution of the plan will be achieved by additional specific directions and roadmaps directed and targeted to complete the elements of the overall strategy. By undertaking this agile approach, we are creating a continuous planning cycle to allow for the changing contexts in the IT space and ensuring we steward the University’s IT resources and investments to best effect.

The IST plan outlined here aligns with the themes, objectives, and goals of the Institutional Strategic Plan and is consistent with the cultural norms of the institution.
Collegiality and collaboration are at the heart of the IST Strategic Plan and will inform the actions stemming from the plan while aligning with the following objectives from the University of Alberta’s Institutional Strategic Plan:

**OBJECTIVE 1:** Build a diverse, inclusive community of exceptional undergraduate and graduate students from Edmonton, Alberta, Canada, and the world.

**OBJECTIVE 5:** Build and strengthen trust, connection, and a sense of belonging among all members of the university community through a focus on shared values.

**OBJECTIVE 6:** Build and support an integrated, cross-institutional strategy to demonstrate and enhance the University of Alberta’s local, national, and international story, so that it is shared, understood, and valued by the full University of Alberta community and our many stakeholders.

**OBJECTIVE 7:** Increase graduate and undergraduate students’ access to and participation in a broad range of curricular experiential learning opportunities that are well-integrated with program goals and enrich their academic experience.

**OBJECTIVE 10:** Expand access to and engagement in the University of Alberta for learners engaging in continuing and professional education programs, experiences, and lifelong learning activities.

**OBJECTIVE 13:** Enable University of Alberta researchers to succeed and excel.

**OBJECTIVE 14:** Inspire, model, and support excellence in teaching and learning.

**OBJECTIVE 15:** Foster a culture of excellence by enriching learning and professional development opportunities for staff, faculty, and post-doctoral fellows.

**OBJECTIVE 18:** Seek, build, strengthen, and sustain partnerships with local, national, or international research agencies, governments, government ministries and agencies, universities, Indigenous communities, libraries, not-for-profits, industry, business, and community organizations.

**OBJECTIVE 21:** Encourage continuous improvement in administrative, governance, planning, and stewardship systems, procedures, and policies that enable students, faculty, staff, and the institution as a whole to achieve shared strategic goals.

**OBJECTIVE 22:** Secure and steward financial resources to sustain, enhance, promote, and facilitate the university’s core mission and strategic goals.

**OBJECTIVE 23:** Ensure that the University of Alberta’s campuses, facilities, utility, and information technology infrastructure can continue to meet the needs and strategic goals of the university.
Moving Forward

The IST Strategic Plan sets forward a vision, one where subsequent action and pursuit will:

enable researchers to pursue groundbreaking research discoveries through a renewed research technology ecosystem that supports existing technologies and integrates increased capabilities;

enhance the student experience through greater integration of systems and processes that improve range, depth, and speed of services;

enable faculty to pass along knowledge effectively by leveraging ever changing capabilities in educational technology to meet the needs of students while supporting existing teaching and learning technologies; and

support administration to move the University forward through continual support of core administration systems and performance improvement of these systems.
Providing a vital informational and technologically enabled environment that inspires innovative thinking, continuous development, advanced learning, and generative research.
For more information about our strategic plan and initiatives, contact:

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