IT Strategic Planning Tactical Plan

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Goal #1: Empower and Enhance Learning and Research

Project Information

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<th>Project #1: Classroom/Open-access Computing Labs Project</th>
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<td>Date:</td>
<td>June 10, 2004</td>
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<tr>
<td>Type:</td>
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1. Objective:

   Phase 1:
   1.1. Conduct a university-wide assessment of classroom and open-access computing lab information technology.
   1.2. Develop a recommendation and implementation plan by September 30, 2004 for implementation of immediate upgrades and improvements.

   Phase 2:
   1.3. Develop a classroom and open-access computing lab model strategy and implementation plan to provide technology-rich physical and virtual classrooms and open-access computing labs for teaching and learning that are consistent across the university while reflecting the programmatic needs of the individual disciplines.
   1.4. Develop the model and high-level implementation plan by February 2005 to ensure inclusion in the FY06 budgeting process.
   1.5. Complete the development of the model and implementation plan by June 30, 2005.

2. Background & Narrative:

   2.1. During the internal environmental analysis phase of the Information Technology Strategic Planning Project, information technology in classrooms and open-access labs came up frequently in discussions with students and faculty as needing improvements, consistency, and ongoing support.

3. References:

   3.1. IT Strategic Plan Goal 1.1.5 Classroom/Open-access Computing Lab Technology and Support: Provide technology-rich physical and virtual classrooms and open-access computing labs for teaching and learning that are consistent across the university while reflecting the programmatic needs of the individual disciplines. Review and improve the current standards and levels of support provided for all open-access computing labs within the university. Identify emerging opportunities/technologies to experiment with and prototype. Establish a program to ensure that technology in all open-access computing labs and classrooms is current and refreshed.

4. Deliverables:

   4.1. University-wide assessment of the status of technology in classrooms and open-access labs.
   4.2. Identification of baseline level of information technology for basic-use classrooms and open-access labs.
   4.3. University-wide model that specifies the various levels of classrooms and open-access labs based on the academic and research needs for technology.
   4.4. A strategy to provide technology-rich physical and virtual classrooms and open-access computing labs for teaching and learning that are consistent across the university while reflecting the programmatic needs of the individual disciplines.
   4.5. Gap analysis between status and baseline level of technology for classrooms and open-access labs.
   4.6. Plan for immediate upgrades and improvements to basic-use classrooms and open-access labs.
4.7. Model for ongoing support of the information technology in classrooms and open-access computing labs. To include:

- A classroom information technology support unit including central dispatch desk, “hot line” phone system.
- Faculty/student advisory group.
- Model for ensuring the technology in classrooms and open-access computing labs is current and refreshed.
- Defined tiers of technology classrooms and open-access labs.
- Model for the continual identification of emerging opportunities/technologies relevant to classrooms and open-access labs that includes using prototypes.
- Recommendations for the implementation of the various models.

4.8. Implementation plan to implement the model for ongoing support of information technology in classrooms and open-access computing labs.

5. Dependencies & Impacts:

5.1. Project #2: Classrooms/Open-Access Labs Improvement Project. Assessment and gap analysis must be completed by September 30, 2004 to ensure immediate improvements are made during FY05 within Project #2.

6. Stakeholders to be Involved:

- IT Services
- Academic TSRs
- College internal information technology services and support
- Schools internal information technology services and support
- Selected faculty
- Tim Reisert
- Bryan Powell, College of Arts & Science, Computer Support
- Chris Wolfe
- CELT
- ITS Computing & Communications, Nate Johnson
- Middletown Campus
  - 1 computer center staff (Brad Farr)
  - 1 faculty (Diane Deliso)
  - 1 student (Gabe Cambell)
  - Chuck Mack or his representative
- Libraries internal information technology services and support
- Selected students
- Mark McBride
- Glenn Platt, IMS
- OARS
- Randy Mikesell
- Carolyn Gard
- Hamilton Regional Campus – internal information technology services and support
- Tom Montgomery
- Physical Plan
- Course Schedulers
- Scott Apfeld
- University Security Officer, Richard Knowles
1. Objective:
   1.1. Implement upgrades and improvements resulting from Project #1: Classroom/Open-access Computing Labs Project by July 2005.

2. Background & Narrative:
   2.1. During the internal environmental analysis phase of the Information Technology Strategic Planning Project, classrooms and open-access labs were brought up frequently as needing improvements, consistency, and ongoing support. As a result, phase I of this project will focus on immediate improvements, while phase II of the project will develop the longer-term strategy and implementation.

3. References:
   3.1. IT Strategic Plan Goal 1.1.5 Classroom/Open-access Computing Lab Technology and Support: Provide technology-rich physical and virtual classrooms and open-access computing labs for teaching and learning that are consistent across the university while reflecting the programmatic needs of the individual disciplines. Review and improve the current standards and levels of support provided for all open-access computing labs within the university. Identify emerging opportunities/technologies to experiment with and prototype. Establish a program to ensure that technology in all open-access computing labs and classrooms is current and refreshed.
   3.2. Current Classroom Prototype Project

4. Deliverables:
   4.1. Implementation of upgrades and improvements of basic-use classrooms and open-access labs.

5. Dependencies & Impacts:
   5.1. Project #1: Classroom/Open-access Computing Labs Project Phase 1.

6. Stakeholders to be Involved:
   - IT Services
   - Academic TSRs
   - College internal information technology services and support
   - Schools internal information technology services and support
   - Selected faculty
   - Tim Reisert
   - Bryan Powell, College of Arts & Science, Computer Support
   - Chris Wolfe
   - CELT
   - ITS Computing & Communications, Nate Johnson
   - Libraries internal information technology services and support
   - Selected students
     - Mark McBride
     - Glenn Platt, IMS
     - OARS
     - Randy Mikesell
     - Carolyn Gard
     - Hamilton Regional Campus – internal information technology services and support
     - Tom Montgomery
     - Physical Plan
     - Course Schedulers
     - Scott Apfeld
     - University Security Officer, Richard Knowles
     - Middletown Campus
       - 1 computer center staff (Brad Farr)
       - 1 faculty (Diane Deliso)
       - 1 student (Gabe Cambell)
       - Chuck Mack or his representative

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1. Objective:
   Phase 1: Immediate Improvements
   1.1. Based on the results of the internal environmental analysis, identify "quick win" areas for immediate improvements in the area of information technology support of research.

   Phase 2: Research Support Model
   1.3. Develop a model that provides broad support for computation used in research that facilitates distributed high-performance computing while still providing a broad spectrum of services and support for the broader ranges of research activities that occur at Miami University.
   1.4. Create a plan to develop and implement a research IT infrastructure and support model by February 2005 to be included in the FY2006 budget discussions. The model should build on the existing strengths and available resources of the college, schools, libraries, regional campuses, administrative units, and other existing groups. In developing the model, the following should be addressed:
   - Research Information Technology and Network Infrastructure
   - Research Data Storage and Management Services
   - Research Support Services

2. Background & Narrative:
   2.1. Research has become a higher priority for Miami University. As a result, robust infrastructure and support is needed to facilitate this research. The internal environmental analysis indicated an inconsistent, inadequate, and highly distributed information technology infrastructure with limited support for researchers.

3. References:
   3.1. IT Strategic Plan 1.2 Develop Information Technology Infrastructure and Support Plan for Research. The university will establish a well-communicated and collaborative model that provides broad support for computation used in research that facilitates distributed high-performance computing while still providing a broad spectrum of services and support for the broader ranges of research activities that occur at Miami University.

4. Deliverables:
   4.1. Identification of and recommendations for immediate improvements in support for computation used in research.
   4.2. Implementation plan for immediate improvements in support for computation used in research.
   4.3. Information technology needs assessment for research at Miami University.
   4.4. Gap analysis between current services and support and the needs assessed.
   4.5. Short and long-term plans for developing an information technology infrastructure and support plan for research.

5. Dependencies & Impacts:
   5.1. Internal environmental analysis results from the IT Strategic Planning Project.
6. Stakeholders to be Involved:

- OARS
- Luis Actis
- Steve Wright
- Carolyn Gard
- Gil Pacey
- Selected students
- Nate Johnson

- Center for the Advancement of Computational Research
- Debi Allison
- John Kinne
- Bryan Powell, College of Arts & Science, Computer Support
- Middletown, 1 faculty members (Al Cady or Kevin Kittredge)
1. Objective:
   1.1. Implement approved recommendations for immediate improvements by June 30, 2005 in support of research at Miami University.

2. Background & Narrative:
   2.1. Research has become a higher priority for Miami University. As a result, robust infrastructure and support are needed to facilitate this research. The internal environmental analysis indicated an inconsistent, inadequate, and highly distributed information technology infrastructure with limited support for researchers.

3. References:
   3.1. IT Strategic Plan 1.2 Develop Information Technology Infrastructure and Support Plan for Research. The university will establish a well-communicated and collaborative model that provides broad support for computation used in research that facilitates distributed high-performance computing while still providing a broad spectrum of services and support for the broader ranges of research activities that occur at Miami University.

4. Deliverables:
   4.1. Implementation of the recommendations from Project #3: Research Support Model Project.

5. Dependencies & Impacts:
   5.1. Internal environmental analysis results from the IT Strategic Planning Project.
   5.2. Project #3: Research Support Model Project

6. Stakeholders to be Involved:
   - OARS
   - Luis Actis
   - Steve Wright
   - Carolyn Gard
   - Gil Pacey
   - Selected students
   - Nate Johnson
   - Center for the Advancement of Computational Research
   - Debi Allison
   - John Kinne
   - Bryan Powell, College of Arts & Science, Computer Support
   - Middletown – 2-3 faculty members (Al Cady, Beth Uhler)
1. Objective:
   Phase 1: Immediate Improvements
   1.1. Assess the effectiveness of the current on-line course management system.
   1.2. Identify and recommend immediate enhancements to the on-line course management system by August 30, 2004.
   Phase 2: Continuous Improvement Process
   1.3. Develop a long-term plan for continuous improvements by February 2005 to be included in the budget discussions for FY2006.

2. Background & Narrative:
   2.1. Based on the internal environmental analysis, the current on-line course management system has significant shortcomings for students and faculty in the area of access, service, support, and capabilities.

3. References:
   3.1. IT Strategic Plan Goal 1.1.2: On-line Course Management: Collaborate with students, faculty, and researchers to develop on-line learning materials and media to enhance the learning experience for all students. Ensure continuous improvement in the mission critical on-line course management system and a robust web-based learning infrastructure to support courses at the university.

4. Deliverables:
   4.1. Assessment of the current on-line course management system and the needs of users.
   4.2. Gap analysis between current on-line course management system effectiveness and capabilities of the system.
   4.3. Recommendations for immediate enhancements to the current on-line course management system.
   4.4. Long-term plan for continuous improvements to Miami’s on-line course management system.

5. Dependencies & Impacts:
   5.1. Project #6: On-line Course Management System Improvement Implementation Project.

6. Stakeholders to be Involved:
   - Carolyn Gard
   - Mark McBride
   - Kent Covert
   - CELT
   - Hamilton – Kathleen Weber, Eloise Lafferty, Continuing Education and Business & Industry Center
   - Nate Johnson
   - Faculty
   - Students
   - Library
   - IMS
   - Middletown:
     - 1 student
     - 2 faculty (Jean Vanderbeek)
     - Bev Compton
1. Objective:
   1.1. Develop implementation plan for and Implement the approved recommendations by February 2005.

2. Background & Narrative:
   2.1. Based on the internal environmental analysis, the current on-line course management system has significant shortcomings for students and faculty in the area of access, service, support, and capabilities.

3. References:
   3.1. IT Strategic Plan Goal 1.1.2: On-line Course Management: Collaborate with students, faculty, and researchers to develop on-line learning materials and media to enhance the learning experience for all students. Ensure continuous improvement in the mission critical on-line course management system and a robust web-based learning infrastructure to support courses at the university.

4. Deliverables:
   4.1. Implementation plan.
   4.2. Implementation of enhancements.

5. Dependencies & Impacts:
   5.1. Project #5: On-line Course Management System Enhancement Project – Phase 1.

6. Stakeholders to be Involved:
   - Carolyn Gard
   - Mark McBride
   - Kent Covert
   - Hamilton – Kathleen Weber, Eloise Lafferty, Continuing Education and Business & Industry Center
   - Middletown
     - 1 student
     - 2 faculty (Jean Vanderbeek)
     - Bev Compton
   - Faculty
   - Students
   - Nate Johnson, ITS Computing and Communications
   - Gail Johnson
   - Library
   - CELT
1. **Objective:**
   1.1. Develop short- and long-term goals to improve information technology literacy at Miami University for students, faculty, and staff.
   1.2. Develop initial budget recommendations for the FY06 budget discussions by February 2005.
   1.3. Develop recommended implementation plans to reach those goals by June 30, 2005.

2. **Background & Narrative:**
   2.1. Based on input received during the internal environmental analysis and subsequent meetings, information technology literacy and the use of technology varies considerably among graduate students, undergraduate students, faculty, and staff. All constituent groups identified a critical need for basic level information and information technology skills.

3. **References:**
   3.1. IT Strategic Plan Goal 1.1.8: Information Technology Literacy: Facilitate collaboration to establish specific goals for information technology literacy across the university recognizing the diversity of information technology fluency among students, faculty, and staff and the need for discipline-specific goals. Facilitate the development of a training and support program to meet those goals so they can be full participants in the information technology community.

4. **Deliverables:**
   4.1. Assessment of the current information technology literacy levels at Miami University.
   4.2. Identification of the minimum level of information and information technology skills needed by the individual constituent groups and subgroups.
   4.3. Identification by the college and schools of the minimum IT literacy requirements and skills sets needed for the academic programs.
   4.4. Goals for information technology literacy across the diverse constituent groups at the university including students, faculty, and staff.
   4.5. Short-term plan to address immediate information technology literacy needs and budget recommendations for FY06.
   4.6. Long-term plan to address information technology needs including an ongoing training and support program and continuous improvement recommendations.

5. **Dependencies & Impacts:**
   5.1. Learning Community Project – University Libraries.

6. **Stakeholders to be Involved:**
   - Stan Brown
   - Libraries
   - Judith Sessions
   - Carolyn Gard
   - College
   - Kay Fultz, TSR, Office of Admissions
   - Hamilton – Rebecca Zartner, Joseph Phillips
   - Lisa Sheard, TSR, Student Affairs
   - Schools
   - Administrative Units
   - Gail Johnson
   - Paul Anderson
   - Carolyn Haynes
   - Hamilton – Kathleen Weber, Eloise Lafferty, Continuing Education and Business & Industry Center
   - Middletown -- Joe Phillips or library representative,
   - 1 faculty (Jean Vanderbeek), 1 student
1. **Objective:**

   **Phase 1: Model Development**
   1.1. Develop a model for a team approach to the development of on-line course materials that augment traditional classroom experiences and that promote the effective development and implementation of distance learning courses.

   **Phase 2: Pilot Implementation**
   1.2. Develop an implementation plan to pilot the model by February 2005.
   1.3. Begin implementation of the pilot in March 2005.

2. **Background & Narrative:**

   2.1. The internal and external environmental analyses highlighted the diverse missions of Miami University's campuses and the higher education trend for distributed and distance learning to meet the diverse needs of today's students. In addition, traditional students are asking for more on-line and distance learning opportunities. The regional campuses, Middletown and Hamilton, are especially suited to take advantage of this trend to maintain competitiveness in higher education.

3. **References:**

   3.1. IT Strategic Plan Goal 1.1.3: Distributed and Distance Learning Model: Recognizing the general trend in higher education to deliver courses in innovative ways, facilitate collaboration in the development of a model for distributed and distance learning opportunities to meet the diverse needs and expectations of the students and faculty.

4. **Deliverables:**

   4.1. Recommended model for a team approach to the development of:
   - On-line course materials that augment traditional classroom experiences.
   - Distributed and distance learning courses.

   4.2. Ensure model is in keeping with university mission and goals.
   4.3. Project initiation and planning for the implementation of the pilot.
   4.4. Beginning of the implementation of the project.

5. **Dependencies & Impacts:**

   5.1. Carolyn Gard joining the IT Services staff.

6. **Stakeholders to be Involved:**

   - Carolyn Gard
   - Regional Campuses
   - Regional Faculty
   - Regional Students
   - Hamilton – Jim Lipnickey, Paul Cantonwine, Lee Sanders
   - Hamilton – Kathleen Weber, Eloise Lafferty, Continuing Education and Business & Industry Center
   - IMS
   - Library
   - Middletown: 3 faculty (Janet Hurn, Jean Vanderbeek, Beth Uhler), Andrea Han, 1 computer center staff, 1 student
   - The OLN Learning Community could get involved here.
   - Gail Johnson
   - Diane Delisio
   - Jerry Stonewater
   - Continuing Education
   - Education School (outreach to teachers)
   - Provost
   - Deans
   - Department Heads
   - Faculty
   - Students
   - CELT
Goal #2: Build and Expand Reliable, Robust, and Secure Access to Information & Technology

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<td><strong>Type:</strong> IT Services Implementation Project</td>
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1. **Objective:**
   1.1. Move the university data network connection from leased DS3 lines to the Butler County Fiber

2. **Background & Narrative:**
   2.1. Drivers behind this effort include:
      - The Butler County Fiber became operational in August 2002 (TTG: TRUE?) and provides a redundant data path from Oxford to several points in the county
      - The State of Ohio’s Third Frontier Network will provide a fiber data connection from the Butler County Fiber (probably in Evendale) to OARNET, the university’s primary ISP
      - The DS3s currently used to connect the university to OARNET are expensive and have a maximum capacity of 90 Megabits per second
      - The Fiber connection will have a maximum bandwidth of 1,000 Megabits per second (bandwidth is purchased separately)
      - The Third Frontier network project expects to provide a fiber data connection to the university in summer 2004.

3. **References:**
   3.1. IT Strategic Plan Goal 2.1: Network Infrastructure Support and Enhancement: Preserve and enhance the network infrastructure through an ongoing commitment to upgrade, extend, and diversify its capabilities and support. Regularly refresh the network services, introducing newer versions of supported operating systems and key applications (e.g., file, print, backup, electronic mail, and scheduling/calendaring) as they become available and in accordance with the university academic and administrative calendars.

4. **Deliverables:**
   4.1. A more robust and more capable data network connection to OARNET as well as other potential Internet Service Providers.

5. **Dependencies & Impacts:**
   5.1. Must be in place for the development of Project #4: Research Support Improvement Project.

6. **Stakeholders to be Involved:**
   - John Kinne
   - Tim Gruenhagen
   - Micah Cooper
   - Nate Johnson
   - Tom Walsh
   - Kathie Brinkman
   - Kim Schmidt
   - Carrie Ledford

**NOTE:** An important issue here is getting high-speed access to those offices and labs with critical needs, and doing so quickly; this will also require a plan to add access for newly hired faculty or new grant recipients whose needs are identified on relatively short notice. This concern should be tied to Project 9, but may better be handled under some other project.
1. Objective:

1.1. Pilot an alternative to the current broadband remote access (RoadRunner) using wireless technology provided by Navini, through NEC for the Oxford-area Miami University residential community (according to NEC-provided coverage map). A primary goal of this pilot project is to determine if 250+ subscribers can be supported per antenna.

1.2. The pilot will be complete by the end of November 2004, including the return of all user exit surveys and user equipment.

1.3. If criteria for a “go” decision are met by the pilot, the next step is to form a project team to plan the production rollout, possibly during the Spring of 2005.

2. Background & Narrative:

2.1. Wireless and off-campus access were raised often during the environmental analysis.

2.2. On December 4, 2003, this team received authorization to purchase equipment to conduct a pilot test involving 500 residential users in the Oxford area in an effort to test Navini as an alternative to the current cable services provided by Time Warner. The current contract with Time Warner terminates in the summer of 2005.

2.3. NEC has proposed using Navini equipment, which currently uses a proprietary communications protocol. The Navini architecture does not require “line of site” to provide services. The pilot will operate in the unlicensed 2.4 Ghz band. It is anticipated that a production service would operate in the 2.5GHz band and require FCC radio communications licenses. Service coverage maps will be provided by NEC for the pilot.

3. References:

3.1. IT Strategic Plan Goal 2.7 Wireless: Aggressively pursue the creation of a community-wide wireless infrastructure by expanding and coordinating wireless access consistent with the university’s mission and scope.

3.2. IT Strategic Plan Goal 2.11 Connectivity Enhancement: Provide students, faculty, and staff with uniform and reliable access to computing, research servers, and network services and resources, on- and off-campus.

3.3. IT Strategic Plan Goal 2.12 Access to Computers and Networks: Explore the needs and opportunities for location-independent access to services including technology support, the Internet, university networks, Internet2, and other emerging research networks.

4. Deliverables:

4.1. Detailed Pilot design, including: defined user group; zero-install user training plan; pilot packages distribution schedule.

4.2. Implementation Readiness plan, including: tasks required for production release; schedule of those tasks.

4.3. Assessment of critical path milestones for a decision regarding production for review by Steering Team & Sponsor.

4.4. Provision of Navini service in the 2.4 Ghz band for use by the pilot group.

4.5. “Go/No-Go” Decision Criteria –Success measures for the pilot defined.

4.6. Final recommendation based on pilot results.
5. Dependencies & Impacts:

5.1. Depends on deliverables from the Network and Workstation Projection Strategy Study Project.
5.2. Depends on one deliverable from the Network Architecture project – DNS/DHCP.
5.3. Interaction with on campus wireless deployment project must be considered.

6. Stakeholders to be Involved:

- IT Services
- Tom Walsh
- John Kinne
- Kathie Brinkman
- Student
- Nate Johnson
- Tim Gruenhagen
- Navini, Walt Marusak
- NEC, Susan Fiorucci
- Others from the university outside IT Services
- Need involvement if migrates to Hamilton/Middletown
1. Objective:

1.1. The intent of this project is to evaluate the current functionality offered by the production email and calendaring services, identify new requirements, and determine and recommend the future, integrated architecture in a report accepted by the Vice President of Information Technology Services. By February, 2005, estimate cost of acquisition to include in budget planning for the following fiscal year.

1.2. The desired system will be robust, redundant and recoverable, providing a common platform across the university. The desired vendor will provide a comprehensive suite of services including software and hardware acquisition, installation, and support, but those vendors not providing bundled services will not be excluded from consideration. The audience for this recommendation is IT Services executive and technical staff, executive staff from the University divisions, student representatives, and administrative office representatives.

2. Background & Narrative:

2.1. Drivers behind this effort include the need for the following system characteristics:

- Reduced recovery time
- Tiered, prioritized recovery capabilities
- Incremental recovery capabilities
- Relative security
- In addition, the internal environmental analysis included input from all constituency groups as to the need for a consistent, reliable email and calendaring system.

3. References:

3.1. Information Technology Strategic Plan Goal 2.4: Enterprise Communications Applications: Explore and implement effective means of communications for all university constituent groups and between the university and the global community. Establish and promote a common technical foundation and shared architecture to leverage these communication tools, including:

- Communications Applications: Provide enhanced and new communications services (e.g., email, video conferencing, instant messaging, and web sites) to students, faculty, and staff and designated affiliates so that communications is conveniently accessed from on- and off-campus, easy-to-use, reliable, highly available, and secure. Systems must be enhanced to further combat unsolicited communications and viruses.
- Scheduling/Calendar: Explore possibilities for the use of technology to enhance university-wide scheduling or calendaring to support students, faculty, staff, and resources.

4. Deliverables:

4.1. Current system assessment (developed from: 1. Email Policy Team Report; 2. current functionalities gathered from internal, technical experts; 3. IT Services Management input; 4. consideration for Continuous Operations issues).

4.2. Requirements for a new system, including: 1. University-wide acceptance criteria; 2. Acceptance criteria for university units not currently using Sendmail.

4.3. Issue RFP to vendors by December 31, 2004. Determine cost to include in FY06 budget by February, 2005.

4.4. Determine Top 3 options. Pilot test, perform functional analysis for top option. (Repeat for others, only if needed.)

4.5. Recommendation for a new system to purchase.
5. Dependencies & Impacts:
   5.1. Network & Workstation protection: required for robust service delivery
   5.2. Wireless deployment: email & calendaring should work well on a wireless connection
   5.3. Strategic & Tactical Security: email & calendaring authentication credentials must be protected
   5.4. Disaster Recovery: email & calendaring services must be available after a disaster

6. Stakeholders to be Involved:
   - John Vaughn
   - Carrie Ledford
   - Steve Moore
   - Computing & Communications Services
   - Kay Fultz, TSR, Office of Admission
   - CISC Senate Committee Representative
   - Nate Johnson
   - University Security Officer, Richard Knowles
   - Faculty Representative
   - Regional campuses
   - Support Services
   - Information Systems & Services
   - Academic Technology Services
   - Middletown: 1 faculty, 1 staff (Sandi Sandlin, Peggy Schubert), Bev Compton

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1. Objective:
   1.1. Develop a strong model for managing storage growth.
   1.2. Develop a menu of services to be provided and supported.
   1.3. Implement a pilot project to be completed by June 2005.

2. Background & Narrative:
   2.1. Drivers behind this initiative include:
       - Many university units have developed their own collection of infrastructure services, they are now using staff dedicated to their units to maintain this infrastructure.
       - As an ever-increasing amount of attention is required to maintain security and service on technology infrastructure, staff that could be helping units address their unique needs are instead maintaining infrastructure.
       - Units have been reluctant to use central services because central services are limited.
       - This initiative will provide large amounts of storage at no cost thus encouraging adoption.

3. References:
   3.1. IT Strategic Plan Goal 2.2: Management and Distribution of Servers: Develop a model for effective management of network file servers including a replacement cycle and the consolidation of distributed servers with more capable and reliable centrally managed server clusters.

4. Deliverables:
   4.1. A Novel based file storage mechanism that will provide large amounts of professionally managed, robust, storage at no cost to a select (two or three) university units.
   4.2. We must ensure that an appropriate support model is put into place. Currently, users go to their TSR for assistance. The time the TSR spends supporting these clients will now be spent by IT Services Support Center and Technical Support. We must be prepared to handle this additional work.
   4.3. We must determine what changes are necessary for acctgen/use of the HOME_DIRECTORY attribute to support this effort.

5. Dependencies & Impacts:
   5.1. Make sure the SAN is in place, (due end of June), and test extensively.
   5.2. It’s possible that the Open Classroom (#1) and Customer Support Model (#21) will require this model and testing to be complete also.
   5.3. The Network Architecture project (#13) will be connected to this project to ensure that there is physical space available for the servers and that other hub connections are in place.
   5.4. Ultimately, this project will become operationalized and be a standard part of monitoring growth of the system and storage requirements.

6. Stakeholders to be Involved:
   - John Kinne
   - Information Systems & Services
   - Academic Technology Services
   - Computing & Communications Services
   - Middletown, Lee Back
   - Faculty Representative
   - Regional campuses
   - Support Services
   - CACR Representative
   - Nate Johnson

NOTE: There should be a flexible and transparent means of connecting specially obtained or designated servers to the central system.
1. Objective:
   1.1. Complete a Network Assessment to determine needed improvements in network robustness and service.
       - physical network study
       - logical network study
   1.2. Identify Major improvement activities and strategize their accomplishment.
   1.3. Pursue needed improvements

2. Background & Narrative:
   2.1. The MUnet network has served the university well. It was designed and implemented in the mid 1990s and has been improved since. However, a physical and logical assessment is needed to ensure the network is appropriately resilient to physical and logical disruption.

3. References:
   3.1. IT Strategic Plan Goal 2.1: Network Infrastructure Support and Enhancement: Preserve and enhance the network infrastructure through an ongoing commitment to upgrade, extend, and diversify its capabilities and support. Regularly refresh the network services, introducing newer versions of supported operating systems and key applications (e.g., file, print, backup, electronic mail, and scheduling/calendaring) as they become available and in accordance with the university academic and administrative calendars.
   3.2. Data Voice Video Network Architecture study Request for Proposals

4. Deliverables:
   4.4. Equipment to support a 2ndary ISP
   4.5. Improved dns/dhcp environment
   4.6. Improved packet shaping
   4.7. Redesigned MUnet core t separate routing and distribution functions

5. Dependencies & Impacts:
   5.1. DNS & DHCP are required for the Network Workstation Protection Project and the Oxford Wireless project.
   5.2. Meshed network and 2ndary ISP connection improves the university’s disaster readiness
   5.3. Supports Email and Calendaring with robust service foundation
   5.4. better troubleshooting and monitoring tools are needed.

6. Stakeholders to be Involved:
   • John Kinne
   • Support Services
   • Middletown, Lee Back
   • Physical Facilities Department
   • Computing & Communications Services
   • Nate Johnson
   • University Security Officer, Richard Knowles

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Project Information

Project Name: Project #14: Network and Workstation Protection Strategy Study
Date: June 10, 2004
Type: IT Services Implementation Project

1. Objective:
   1.1. Define security zones with minimum standards & requirements
   1.2. Determine and recommend the best solution for:
      1.2.1. Network Registry System. Register devices that attach to the network in order to receive some (or all) service.
      1.2.2. Management of Microsoft Software patch system. Require identified patch levels or to push critical updates to hosts on the network.
      1.2.3. Virus Protection for all. Ensure every MUnet connected host operates current virus protection software.
      1.2.4. Desktop Firewall Solution. Distribution of managed desktop firewall to hosts connected to MUnet.
      1.2.5. Control by MAC Address (“penalty box”). Limit network service to a misbehaving host on MUnet. Consider the elimination of shared segments and the acquisition of new DHCP/DNS servers to implement.
      1.2.6. On-line Remediation. Self-service for end-users to resolve the issue causing a host to misbehave. Consider the necessity of a new DNS and DHCP service to facilitate this.
      1.2.7. Vulnerability and exploit filtering. Implementation of devices, such as Tipping Point’s Unity One, that discards undesired packets.
      1.2.8. The study will also analyze the impact of these areas of focus/concern on current standards and policies.
   1.3. Identify improvements that can be made by 8/1/2004
   1.4. Initiate activities to deploy improvements by 8/1/2004

2. Background & Narrative:
   2.1. Drivers behind this initiative are as follows:
      - Risk to the other machines and the network when compromised workstations are present
      - Excessive MU staff time is spent dealing with problems from compromised workstations
      - Necessity of meeting legal requirements for data protection
   2.2. This project will result in a strategy for technology deployment at Miami University that protects university assets and data stored on workstations by mitigating risk and ensuring due diligence.
   2.3. The next step from this effort, which will be addressed as a separate project, is to implement the recommended solution. The initial phase of implementation will be identified by April 15th and completed by August 2004. A phased, prioritized, rollout calendar will be produced with the completion of the study.

3. References:
   3.1. IT Strategic Plan Goal 2.1: Network Infrastructure Support and Enhancement: Preserve and enhance the network infrastructure through an ongoing commitment to upgrade, extend, and diversify its capabilities and support. Regularly refresh the network services, introducing newer versions of supported operating systems and key applications (e.g., file, print, backup, electronic mail, and scheduling/calendaring) as they become available and in accordance with the university academic and administrative calendars.

4. Deliverables:
   4.1. Recommendation for a new solution, including options for outside resources to handle deployment.
   4.2. Prioritized assessment and rollout calendar of what can be achieved with the new solution, beginning with an initial phase deployment target of August 2004.
   4.3. Justification and prioritization of existing budgetary requests needed to perform hardware and software upgrades required of the new solution.
   4.4. Justification of personnel costs to support new solution.
5. Dependencies & Impacts:

5.1. Improvements beyond 8/1/04 implementation will be added to the Security Strategy Project #16.
5.2. These improvements must be in place to support the Wireless Deployment in the residence halls (#15). If they aren’t at a satisfactory level, then the Wireless deployment will be delayed. The priority was clear here – the network as it exists today must be supported well and new services must meet those standards.

6. Stakeholders to be Involved:

- Tim Gruenhagen
- John Kinne
- Kathie Brinkman
- Academic Technology Services
- Computing & Communications Services
- Middletown, Teri Newton
- Faculty Representative
- Regional campuses
- IT Services Security Officer
- Support Services
- Information Systems & Services
- Nate Johnson
- University Security Officer, Richard Knowles

NOTE: This project needs to ensure support for the full range of architectures that may be needed by individuals.
Project Information

Project Name: Project #15: On-campus Wireless Deployment Strategy Development and Implementation Project
Date: June 10, 2004
Type: Miami University Study Project and IT Services Implementation

1. Objective:
   Phase 1:
   1.1. Complete campus residential hall implementation by August 2004
   Phase 2:
   1.2. Develop a plan and implementation roll out and support strategy for a wireless infrastructure at Miami University.
   1.3. Begin implementation of the plan in FY05.

2. Background & Narrative:
   2.1. By far, the top priority expressed during the internal environmental analysis was wireless at Miami. To remain competitive in higher education and meet the increased demand for wireless access, this project becomes a high priority.

3. References:
   3.1. IT Strategic Plan Goal 2.7: Wireless: Aggressively pursue the creation of a community-wide wireless infrastructure by expanding and coordinating wireless access consistent with the university’s mission and scope.

4. Deliverables:
   4.1. Inventory of the current on-campus wireless environment at each campus.
   4.2. Architecture/feasibility study.
   4.3. Recommended implementation strategy for wireless at Miami University.
   4.4. 85% implementation of the plan in FY05.

5. Dependencies & Impacts:
   5.1. Use of outside resources required.
   5.2. Network/Workstation Protection Study recommendations will impact the manner in which this service is deployed.

6. Stakeholders to be Involved:
   - Faculty Representative
   - Regional campuses
   - Support Services
   - Academic Technology Services
   - Computing & Communications Services
   - Nate Johnson
   - Student Representative
   - TSR Representative
   - HDGS Representative
   - Library Representative
   - Middletown, Lee Back
   - University Security Officer, Richard Knowles
1. **Objective:**
   1.1. Develop a model to ensure a strong foundation for information technology security coordinated with university continuous operations planning. Develop and implement policies and procedures to protect the security of university information technology and institutional data, safeguard personal privacy, and respect intellectual property rights, while at the same time promoting academic freedom with access to information.

2. **Background & Narrative:**
   2.1. With the rise in security and disaster recovery issues in information technology and the unique issues that exist in higher education, a strategic and tactical security and business continuity project is critical.

3. **References:**
   3.1. IT Strategic Plan Goal 2.6: Security: Develop a model to ensure a strong foundation for information technology security coordinated with university continuous operations planning. Develop and implement policies and procedures to protect the security of university information technology and institutional data, safeguard personal privacy, and respect intellectual property rights, while at the same time promoting academic freedom with access to information.

4. **Deliverables:**
   4.1. Assessment of the current state of information technology security and disaster recovery at Miami.
   4.2. An implementation plan to make immediate improvements where possible. The Network and Workstation Protection Project will accomplish only those tasks that are possible to implement by August 1, 2004; the remaining tasks from the project will be rolled into this security strategic plan. However, the timeline for next steps needed to protect the network may be immediate and require quick action on these tasks that remain to be implemented.
   4.3. Strategic security and business continuity plan.
   4.4. Policies and procedures.
   4.5. Tactical security and business continuity plan.

5. **Dependencies & Impacts:**
   5.1. Use the outcome from the Network and Workstation (#14) project as a starting point.
   5.2. Since this strategy will evolve over time, the project will need to take into account all environmental evolutions as well, e.g. Wireless, 3rd Frontier, Storage and Server, etc.

6. **Stakeholders to be Involved:**
   - University Security Officer, Richard Knowles
   - Information technology service and support providers throughout Miami University
   - Students
   - CISC Senate Committee Representative
   - Faculty
   - Staff
   - IT Governance Structure
   - Support Services, Support Desk & Admin Support
   - Middletown, Teri Newton
   - Nate Johnson
Project Information

Project Name: **Project #17: Enhance Disaster Recovery Capabilities Project**
Date: June 10, 2004
Type: Miami University Study Project

1. **Objective:**
   
   **Phase 1: Immediate Improvements**
   1.1. Improve the protection of Hoyt Hall and the Hughes machine room by 6/30/05.
   **Phase 2: Ongoing disaster recovery**
   1.2. Develop an ongoing strategy for disaster recovery.

2. **Background & Narrative:**
   
   2.1. Drivers for this initiative are the needs for technology services which persist after a disaster. The university conducted a Continuous Operations Study over the last several years. A resultant $360,000 was allocated to improve disaster readiness.

3. **References:**
   
   3.1. IT Strategic Plan Goal 2.9: Disaster Recovery: Develop, document, and test adequate disaster recovery scenarios and procedures to deal with major disasters affecting technology service availability.

4. **Deliverables:**
   
   4.1. Specific recovery mechanisms for select services to be in place in advance of a disaster.

5. **Dependencies & Impacts:**
   
   5.1. Since this strategy will evolve over time, the project will need to take into account all environmental evolutions as well, e.g. Wireless, 3rd Frontier, Storage and Server, etc.

6. **Stakeholders to be Involved:**

   - University Security Officer, Richard Knowles
   - Information technology service and support providers throughout Miami University
   - Students
   - Support Services
   - Information Systems & Services
   - Academic Technology Services
   - Computing & Communications Services
   - Faculty
   - Staff
   - IT Governance Structure
   - Faculty Representative
   - Regional campuses
   - IT Services Security Officer
   - CISC Senate Committee Representative
   - Middletown, Teri Newton or Lee Back
   - Nate Johnson

NOTE: This project raises the question of individual workstation recovery. A well-advertised solution for backing up individual machines needs to be in place; at the moment, it's all left up to personal daily habits (or the lack thereof), whereas the availability of ADSM is one of the best kept secrets at Miami.
### Project Information

<table>
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<th>Project Name:</th>
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1. **Objective:**

1.1. Evaluate opportunities for providing universally available software licenses to support multiple platforms, developing processes to support volume purchasing of software, creating access to the software regardless of geographic location, and offering central maintenance and clearinghouse capabilities.

2. **Background & Narrative:**

2.1. The need for consistent and universally available software licensing was raised during the internal environmental analysis.

3. **References:**

3.1. IT Strategic Plan Goal 2.5: Software Licensing and Management: Evaluate opportunities for providing universally available software licenses to support multiple platforms, developing processes to support volume purchasing of software, creating access to the software regardless of geographic location, and offering central maintenance and clearinghouse capabilities.

4. **Deliverables:**

4.1. Assessment of the current situation concerning software licensing at Miami University.
4.2. Recommendation for processes to support volume purchasing of software, creating access to the software, and central maintenance and clearinghouse capabilities.

5. **Dependencies & Impacts:**

5.1. Boundary: No funding was allocated to this project. Expectation is that the project would provide a solution that will be self-funded through economies of scale.

6. **Stakeholders to be Involved:**

- IT Services
- Students
- Hamilton – Kathleen Weber, Eloise Lafferty, Continuing Education and Business & Industry Center
- Middletown, 1 faculty, 1 computer center staff, (Andrea Han)
- Faculty
- Staff
- Support Services, Administrative Support
- Steve Wright
- Nate Johnson
- University Security Officer, Richard Knowles

**NOTE:** A serious problem has been the inability to pool resources when licensing software for a relatively small number of people scattered over several departments. Keep in mind that "relatively small number" can mean dozens or hundreds of potential users: if it isn't "almost everybody" then it tends to get ignored. We need a mechanism for identifying these pools of people whenever an individual makes a request (someone has to be the first). It's important to keep in mind that this activity is crucial for supporting innovation and that some form of training may be needed for those with a new interest in incorporating such software into their own work. This concern should be handled more explicitly, perhaps in Project 18 or Project 24.
Goal #3: Promote Customer-centered Information Technology Services & Support

Project Information

Project Name: **Project #19: Establish Customer Advocacy Role in IT Services**

**Date:** June 10, 2004

**Type:** IT Services Implementation Project

1. **Objective:**
   1.1. Establish a role in IT Services that:
       a) Acts as liaison between IT Services and the Miami University campus community in order to provide problem resolution and customer/client communication about new services and programs.
       b) Provides ombudsman role for customers/clients of IT Services, and initiates efforts to deliver accurate and timely information to the University community.

2. **Background & Narrative:**
   2.1. The internal environmental analysis highlighted the need for more customer focus in the area of IT services and support – especially from IT Services (the department). With this in mind, the customer advocacy role was created and included in the FY05 budgeting process.

3. **References:**
   3.1. IT Strategic Plan Goal 3.1: Customer Service Support Model: Identify Miami University information technology customers, customers with special needs, customer characteristics, and customer expectations and needs. Explore options for and implement a customer service support model to meet the customer needs and that provides reliable, ubiquitous access to and support for the use of information technologies.

4. **Deliverables:**
   4.1. Implementation of a customer-focused communications process that provides improved information dissemination and feedback capabilities.
   4.2. Coordinated effort to build strong customer relationships with the regional campuses, academic and administrative units, and students.
   4.3. Improved and effective working relationships with direct customers and customer units.
   4.4. Improved customer satisfaction with IT Services.

5. **Dependencies & Impacts:**
   5.1. Goal #6: Plan and Manage Information Technology, specifically supporting the IT Technology Policy & Governance.
   5.2. Project #20: Communications Model Project for IT Services Department
   5.3. Project #21: Customer Service Support Model Project
   5.4. Project #23: Portal Enhancement or Luminis Implementation
   5.5. Project #24: Innovation Support Model
   5.6. Project #26: Decision Support System Project & Pilot
   5.7. Project #27: Banner System Enhancement and Support Project
6. Stakeholders to be Involved:

- IT Services Management Team
- Divisional Administrative Staff
- Department Chairs and Assistants
- TSRs
- Lisa Sheard, TSR, Student Affairs
- CISC Senate Committee Representative
- Regional campuses
- Faculty
- Staff
- Students
- Glenn Ellerbe, HR Systems and Technologies Coordinator

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Project Information

**Project Name:** Project #20: Communications Model Project for IT Services Department

**Date:** April 30, 2004

**Type:** IT Services Implementation Project

1. **Objective:**
   1.1. Develop and implement a model to improve communications with the stakeholders of the IT Services department support.
   1.2. Develop and implement an internal organization communications process for the IT Services Department.

2. **Background & Narrative:**
   2.1. Throughout the internal environmental analysis, the need for better communications, both internally and externally, was raised -- especially to help stakeholders understand what services and support is available to them.

3. **References:**
   3.1. IT Strategic Plan Goal 3.3: Communication Channels: Increase coordination and communication among the many providers, supporters, and users of information technology at Miami University.
       - 3.3.1 Coordination and Management of Projects: Improve internal coordination and management of projects, including more formal coordination across division groups and increased communication and engagement with the university community.
       - 3.3.2 Availability of Information Technology Services and Support: Improve communication with customers about available information technology services and support.
       - 3.3.3 Formal Communication Processes: Define and manage the user environment and experience through formal processes that guide service rollout, technology evaluation, release management (deploy and decommission), system management documentation, user requirements, and feedback.
   3.2. IT Strategic Plan Goal 6.2.6 Communications: Develop and implement ongoing coordinated information technology communications and feedback mechanisms for students, faculty, and staff.

4. **Deliverables:**
   4.1. Assessment of the current communication methods and channels within IT Services and with IT Services stakeholders.
   4.2. Formal communications plan for IT Services that includes:
       - Stakeholder analysis with stakeholder identification, needs analysis, method possibilities, and possible messages
       - Communication vehicles with schedules and persons responsible
       - Coordination with projects and operations communications
       - Ongoing, regular communications plan with methods, messages, responsibilities, and schedules
       - 6-month one-time communications plan for special communications
       - Strategy for ongoing management of communications for IT Services.
   4.3 IT Services website redesign
       - 6-12 month project from point of inception (probably FY 05-06 timeframe)

5. **Dependencies & Impacts:**
   5.1. Project #19: Establish the Customer Advocacy Role for IT Services
   5.2. ADA compliance of web content should be included in redesign
   5.3. IT Services Tech Talk Newsletter
   5.4. Coordinate with University Communications
6. Stakeholders to be Involved:

- IT Services
- Debi Allison
- Kathie Brinkman
- CISC
- Banner Team Leaders
- Regional Campuses
- IT Senior Directors
- Support Services LIS unit
- IT Services Stakeholders
- University Communications
- TSRs
- Student TAG
- Cornelius & Associates
- Middletown: Brad Farr, 1 faculty, 1 staff
1. Objective:

Phase 1: End-user Workstation Support Pilot Project

1.1. Conduct an assessment and develop a recommendation for end-user workstation support in a unit on the Oxford campus. *Assessment to be complete by March 1, 2005.*

1.2. Implement a pilot project to test and demonstrate a model for improving customer service support in the management and implementation of end-user workstation support during FY05. *Staff to be on board and pilot to begin by July 1, 2005.*

Phase 2: Assessment and recommendation for Customer Service Model

1.3. Identify Miami University information technology clients, clients with special needs, client characteristics, and client expectations and needs.

1.4. Explore options for and implement a customer service support model to meet the client needs and that provides reliable, ubiquitous access to and support for the use of information technologies. The model will provide suitable and appropriate technology support across the university and should explore the following service components:

- Distribution of support staff to provide an optimal support structure and ensure continued levels of appropriate support.
- Support for multiple hardware and software platforms and applications.
- User training.
- Help desk service level optimization.
- University-wide problem reporting and tracking processes.
- Service level agreements.
- Customer satisfaction metrics.
- Continuous improvement processes.

*Assessment and recommendation to be complete by June 1, 2005.*

2. Background & Narrative:

2.1. Customer service was a high priority for all constituencies. One of the critical aspects of customer service needs was for end-user support for their workstations. Implementing a pilot project with one or more units will provide a test bed for strategies and an overall model, and will produce immediate results for improved customer service.

3. References:

3.1. IT Strategic Plan Goal 3.1: Customer Service Support Model: Identify Miami University information technology client, clients with special needs, client characteristics, and client expectations and needs. Explore options for and implement a customer service support model to meet the client needs and that provides reliable, ubiquitous access to and support for the use of information technologies.

4. Deliverables:

Phase 1:

4.1. Identification of a partner unit for the pilot project.
4.2. Assessment of workstation support needs within the pilot unit.
4.3. Model for workstation support including service levels, expectations, etc.
4.4. Implementation plan for the pilot.
4.5. Success measures.
4.6. Implementation of the pilot.
4.7. Assessment of pilot with lessons learned and recommendations for further implementation of the pilot model.
Phase 2:

4.8. Identification and assessment of Miami University information technology customers, customers with special needs, customer characteristics, and customer expectations and needs.


4.10. Identification and documentation of current customer service model components.

4.11. Assessment of the effectiveness of each model component.

4.12. Recommendation for appropriate customer service model components.

4.13. Implementation plan for customer service model components.

5. Dependencies & Impacts:

5.1. Reid Christenberry’s service model concepts.

6. Stakeholders to be Involved:

- IT Services
- Selected unit for pilot
- TSRs
- Lisa Sheard, TSR, Student Affairs

- End-users
- Support providers
- Middletown: Brad Farr, 1 faculty, 1 staff
- IT Services Senior Directors
1. **Objective:**

1.1. The intent of this project is to evaluate the SCT Luminis Portal product and the Documentum Enterprise Content Management Solution and define a recommendation on continuation in a report accepted by the Vice President of Information Technology Services by July 31, 2004. A demo of the products will take place on April 1, 2004. Stakeholders and team members should be finalized prior to the demo to insure participation in the demo.

1.2. **Schedule:**

   - 3/15/2004 Establish stakeholders through scope document with the VP
   - 3/22/2004 Finalize team leaders and team members
   - 4/1/2004 Demo of Luminis and Documentum by SCT
   - 5/15/2004 Establish decision criteria
   - 7/31/2004 Report due to VP

2. **Background & Narrative:**

2.1. In the summer of 2001, MCIS deployed Campus Pipeline's portal product at Miami University as the myMiami service. In the Fall of 2002, citing ongoing severe technical problems, MCIS decided to replace Campus Pipeline's portal product with an in-house developed solution.

2.2. Since that time, Campus Pipeline (now part of Sungard SCT) has replaced their product with a new portal known as Luminis. This portal is based on the open source uPortal project developed by the Java Administration SIG. This new product also includes the Documentum Content Management solution for managing web content within the portal. An enterprise-wide edition of Documentum can be purchased to manage additional web content outside the portal.

2.3. Realizing that the new portal might be better for Miami than the original portal product and that the university might decide to install Luminis, MCIS continued to license the Campus Pipeline portal products even though the product was not currently being used.

2.4. **Criteria:** The following items should be considered in evaluating the products:

   - Robustness and reliability
   - Cost
   - Effort and time to implement
   - Acceptance by stakeholders

3. **References:**

3.1. IT Strategic Plan Goal 2.4 Enterprise Communications Applications: Explore and implement effective means of communications for all university constituent groups and between the university and the global community. Establish and promote a common technical foundation and shared architecture to leverage these communication tools, including:

   - 2.4.1 Communications Applications: Provide enhanced and new communications services (e.g., email, video conferencing, instant messaging, and web sites) to students, faculty, and staff and designated affiliates so that communications is conveniently accessed from on- and off-campus, easy-to-use, reliable, highly available, and secure. Systems must be enhanced to further combat unsolicited communications and viruses.
   - 2.4.2 Use of Technology in University-wide Communications: Explore opportunities to improve the use of technology to enhance community and university-wide communications (e.g., broadcasting, LISTSERV mailing lists, etc.).
   - 2.4.3 Scheduling/Calendaring: Explore possibilities for the use of technology to enhance university-wide scheduling or calendaring to support students, faculty, staff, and resources.
• IT Strategic Plan Goal 2.14 Seamless Access to Information, Research, and Digital Resources: Develop a model for efficient integration of and seamless and consistent access to the university’s information resources including libraries, media, computing, telecommunications, and services such as the Internet and Internet2.

3.2 IT Strategic Plan Goal 3.2: Web-based Services through a Portal Environment: Explore development of a robust portal environment for unified web-based customer services that are tailored to individuals based on their affiliation with the university.

4. Deliverables:

4.1. Recommendation to continue with an implementation of the Sungard SCT Luminis portal
4.2. Recommendation to purchase the Documentum Enterprise Content Management System

5. Dependencies & Impacts:

5.1.

6. Stakeholders to be Involved:

• University Communications - Richard Little, Holly Wissing, Arlene Werts
• Student Affairs – Dennis Roberts, Rick Devine
• ASG – Pushpam Srivastava (2003-04 Communications Director for ASG)
• University Secretary - Karen Schafer
• Academic Affairs - Joe Urell, Mary Woodworth
• Faculty - Steve Wright, Sumit Sircar, Glenn Platt, Christine Noble, Chris Wolfe
• Registrar - Bob Kubat
• Bursar - Ginny Layton
• Financial Aid – Chuck Knepfle
• Admission – Pam Neese, Jen Collignon
• John Goerke
• University Library - Judith Sessions
• Housing, Dining, and Guest Services - Adolf Haislar, Steve Thole, Kirk Hopkins
• Business Affairs – Dale Hinrichs, Mollie Hansel, Dennis Deahl, Janet Cox
• Alumni Affairs - Jerry Wright
• Students - Jeff Toaddy, Mike Goode
• Hamilton Campus - Jim Lipnickey
• Middletown Campus - Barb Edwards
• All IT Services units need representation, ISS Data Administration – William Custer
• CACR Representative
• Middletown: 1 student, 1 faculty
• University Security Officer, Richard Knowles
1. Objective:

1.1. Implement the recommendations from the SCT Luminis & Documentus CMS License Evaluation.
1.2. Schedule:
   - 8/1/2004 Project initiation begins after the Luminis evaluation results in a recommendation to implement
   - 8/1/2004 Begin plans to acquire and install hardware, install software, develop an organization for the portal, develop policies
   - 4/15/2005 Begin testing
   - 7/15/2005 Go live (this date optimistic, project details could move the go-live date into Fall or Winter of 2005.)

2. Background & Narrative:

2.1. In the summer of 2001, MCIS deployed Campus Pipeline's portal product at Miami University as the myMiami service. In the Fall of 2002, citing ongoing severe technical problems, MCIS decided to replace Campus Pipeline's portal product with an in-house developed solution.
2.2. Since that time, Campus Pipeline (now part of Sungard SCT) has replaced their product with a new portal known as Luminis. This portal is based on the open source uPortal project developed by the Java Administration SIG. This new product also includes the Documentum Content Management solution for managing web content within the portal. An enterprise-wide edition of Documentum can be purchased to manage additional web content outside the portal.
2.3. Realizing that the new portal might be better for Miami than the original portal product and that the university might decide to install Luminis, MCIS continued to license the Campus Pipeline portal products even though the product was not currently being used.
2.4. Criteria: The following items should be considered in evaluating the products:
   - Robustness and reliability
   - Cost
   - Effort and time to implement
   - Acceptance by stakeholders

3. References:

3.1. IT Strategic Plan Goal 2.4 Enterprise Communications Applications: Explore and implement effective means of communications for all university constituent groups and between the university and the global community. Establish and promote a common technical foundation and shared architecture to leverage these communication tools, including:
3.2. 2.4.1 Communications Applications: Provide enhanced and new communications services (e.g., email, video conferencing, instant messaging, and web sites) to students, faculty, and staff and designated affiliates so that communications is conveniently accessed from on- and off-campus, easy-to-use, reliable, highly available, and secure. Systems must be enhanced to further combat unsolicited communications and viruses.
2.4.2 Use of Technology in University-wide Communications: Explore opportunities to improve the use of technology to enhance community and university-wide communications (e.g., broadcasting, LISTSERV mailing lists, etc.).
2.4.3 Scheduling/Calendaring: Explore possibilities for the use of technology to enhance university-wide scheduling or calendaring to support students, faculty, staff, and resources.
3.3. IT Strategic Plan Goal 2.14 Seamless Access to Information, Research, and Digital Resources: Develop a model for efficient integration of and seamless and consistent access to the university’s information resources including libraries, media, computing, telecommunications, and services such as the Internet and Internet2.
3.4. IT Strategic Plan Goal 3.2: Web-based Services through a Portal Environment: Explore development of a robust portal environment for unified web-based customer services that are tailored to individuals based on their affiliation with the university.

4. Deliverables:
   4.1. Unified web-based customer services that are tailored to individuals based on their affiliation with the university.
   4.2. Agreement with the Vice President of Information Technology on what feature set of the Portal is within the scope of this project.
   4.3. Policies and support model for management of the Portal objects including authorization policies and procedures.
   4.4. Secure access and distribution of confidential data.

5. Dependencies & Impacts:
   5.1. Project #22: SCT Luminis & Documentum Content Management System (CMS) License Evaluation
   5.2. Project #26: Banner Implementation team may require coordination with Luminis versioning and integration

6. Stakeholders to be Involved:
   - University Communications - Richard Little, Holly Wissing, Arlene Werts
   - Student Affairs – Dennis Roberts, Rick Devine
   - ASG – Pushpam Srivastava (2003-04 Communications Director for ASG)
   - University Secretary - Karen Schafer
   - Academic Affairs - Joe Urell, Mary Woodworth
   - Faculty - Steve Wright, Sumit Sircar, Glenn Platt, Christine Noble, Chris Wolfe
   - Registrar - Bob Kubat
   - Bursar - Ginny Layton
   - Financial Aid – Chuck Knepfle
   - Admission – Pam Neese, Jen Collignon
   - Middletown: 1 student, 1 faculty
   - University Library - Judith Sessions
   - Housing, Dining, and Guest Services - Adolf Haislar, Steve Thole, Kirk Hopkins
   - Business Affairs – Dale Hinrichs, Mollie Hansel, Dennis Deahl, Janet Cox
   - Alumni Affairs - Jerry Wright
   - Students - Jeff Toaddy, Mike Goode
   - Hamilton Campus - Jim Lipnickey
   - Middletown Campus - Barb Edwards
   - All IT Services units need representation, ISS Data Administration – William Custer
   - Lisa Sheard, TSR, Student Affairs
   - CACR Representative
Goal #4: Ensure Continuous Innovation

Project Information

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>Project #24: Innovation Support Model Study Project</th>
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<tbody>
<tr>
<td>Date:</td>
<td>June 10, 2004</td>
</tr>
<tr>
<td>Type:</td>
<td>Miami University Study Project</td>
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1. Objective:

1.1. Develop and promote a support model for innovation and early adopters that supports this philosophy. Begin discussions in FY05 and develop a white paper document/recommendation.

1.2. Develop a mechanism for issuing focused and specialized grants, from IT Services that enable the formation of partnerships with the client community.

1.3. Develop a process for creating appropriate advanced technology centers.

2. Background & Narrative:

2.1. During the environmental analysis, stakeholders indicated that Miami University does not have a formal process to encourage innovation in the use and adoption of new technologies. To remain competitive as a university, Miami must develop a continuous process of encouraging and implementing the use of new technologies.

3. References:

3.1. IT Strategic Plan Goal 4.1 Philosophy for Adoption of New Technologies: Define a philosophy for the adoption of new technologies that ensures relevancy to the university and its mission.

3.2. IT Strategic Plan Goal 4.2 Support Model for Innovation: Develop and promote a support model for innovation and early adopters that supports this philosophy.

   • 4.2.1 Generation of Innovative Ideas: Define a process for ongoing collaboration and formal interactions with peers, vendors, university colleagues, and higher education contacts to track technologies and trends and to generate innovative ideas.

   • 4.2.2 Evaluation and Testing: Develop processes to continually and critically evaluate these ideas in “test-bed” environments, based on the perceived value to the university, the university’s core competencies, and the expectation of interest from potential collaborators.

   • 4.2.3 Approval and Funding: Implement a process to cultivate the most promising ideas, to formalize proposals, and to gain financial commitments and deliverables from interested parties and sponsors.

   • 4.2.4 Deployment: Develop and implement deployment strategies for mainstreaming applicable innovative technologies.

4. Deliverables:

4.1. Philosophy and strategy for adoption of new technologies.

   4.1.1. Support model that includes:

   4.1.2. Processes to encourage the generation of innovative ideas and uses of technology.

   4.1.3. Evaluation and testing processes.

   4.1.4. Approval and funding processes.

   4.1.5. Deployment strategies.

   4.1.6. Recommendation for implementation.

5. Dependencies & Impacts:

5.1. IT Services Senior Management Team in place

5.2. Link to the LTEP program (currently suspended)

5.3. Link to Learning Technologies Summer Institute
6. Stakeholders to be Involved:

- Carolyn Gard
- Regional Campuses
- CISC Senate Committee, Steve Wright, Chair
- SOARS
- ATS Representative
- CCS Representative
- Steve Wright
- Middletown: Andrea Han, Janet Hurn, 1 additional faculty
- University Security Officer, Richard Knowles

- Academic Units
- Academic TSRs
- Regional Campuses
- Support Services Representative
- ISS Representative
- Mark McBride
- CISC Senate Committee Representative
- Nate Johnson
- John Goerke
**Goal #5: Support University Administration and Management**

<table>
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<tr>
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<tr>
<td><strong>Date:</strong>  June 10, 2004</td>
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<td><strong>Type:</strong>  IT Services Implementation Project</td>
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1. **Objective:**

1.1. The objective of this project is to implement the versions of Banner 6 listed below in production for use by all university offices by Monday, October 4. There are several sub-projects; all items not mentioned specifically in a sub-project are understood to be within the scope of this main project.

1.2. Subprojects to this project will do the following:

- **Banner 6 Test Training and Mod Reduction Project.** Led by Dan Johnson. This project will revise office test plans, evaluate modifications for elimination, monitor testing and evaluate training.
- **Banner 6 Student Modification Project.** Led by Phyllis Wykoff. This project will apply all existing modifications in the Banner 5 student system to Banner 6 unless they are identified for retirement.
- **Banner 6 Business Team Modification Project.** Led by Bill Miley. This project will apply all existing modifications in the Banner 5 Business systems to Banner 6 unless they are identified for retirement.
- **Banner 6 Upgrade Installation Project.** Led by Aileen Engel. This project will apply all necessary upgrades to both test and production systems.

1.3. This project and all testing must be completed by 9/15/2004. The go live date for Banner 6 is 10/4/04.

2. **Background & Narrative:**

2.1. The Banner project began in 1998 with Banner 3. Each major upgrade has been a separate project. Banner 5 went into production in October of 2002 including the re-application of all modifications. The go-live date was places several weeks before Registration, after the initial fall crunch and in time for regulatory enhancements at end of year.

3. **References:**

3.1. IT Strategic Plan Goal #5: Support University Administration and Management: Administrative information technology systems are developed and managed collaboratively with end-users to support the administration and management of the university and are responsive to the diverse needs of students, faculty, staff, departments, divisions, and campuses.

3.2. [www.muohio.edu/aisp](http://www.muohio.edu/aisp) includes the following documents:

- Banner 6 Overview Scope Document – This document
- Master Upgrade Plan – Project timeline and dependencies
- Banner 6 FAQ – Answers to frequently asked questions
- Banner Mods for Evaluation for Banner 6 – List of modifications at Miami, each to be evaluated
- Banner 6 Release Notes for Each SCT Product – SCT release notes
- Changed Objects –
- SCT Banner May Release Overview – SCT comments on the Banner release from May
4. **Deliverables:**

4.1. This is the list of the versions we are proposing to go live with in October 2004.

4.2. The month the release is available is in parenthesis after each version.

- SCT Banner Accounts Receivable 6.1 (Apr-04)
- SCT Banner Advancement 6.1.1 (Jan-04)
- SCT Banner Advancement Self-Service 6.1 (Sep-03)
- SCT Banner Employee Self-Service 6.1 (Apr-04)
- SCT Banner Faculty Self-Service 6.1 (Dec-03)
- SCT Banner Finance 6.1 (Apr-04)
- SCT Banner Finance Self-Service 6.0 (May-03)
- SCT Banner Financial Aid 6.5 (Aug-04)
- SCT Banner General 6.2 (Apr-04)
- SCT Banner Human Resources 6.1 (Apr-04)
- SCT Banner IntComp 6.0.2 (Oct-03)
- SCT Banner Position Control 6.0.1 (Jan-04)
- SCT Banner Student 6.1.1 (Jan-04)
- SCT Banner Student Self-Service 6.1 (Dec-03)
- SCT Banner WebTailor 6.2 (Apr-04)
- SCT Banner Web General 6.2 (Apr-04)

4.3. Comprehensive test plans

4.3.1 Who is testing?
4.3.2 What is being tested?
4.3.3 When is testing to be completed.
4.3.4 Who tracts testing information.

4.4. Comprehensive review of involved modules/forms, assessing for change and necessary training needs.

4.5. Review existing documentation assessing currency and need for additional documentation related to module changes and new software features.

4.6. Elimination of unneeded mods.

4.7. Re-application of all mods: business and student.

4.8. Sign off on testing. (Consider formal plan that includes more detail about when testing is to begin, who is doing the testing, contact if the client has problems and who to call upon completion.)

4.9. Communication plan that communicates all changes to the involved individuals/departments/divisions. This plan will include a client feedback mechanism.

4.10. Resolution of any significant issue within 3 days of Monday, October 4.

5. **Dependencies & Impacts:**

5.1. This project requires SAN implementation.

5.2. SCT will Release Banner 6 by 5/1/2004.

5.3. IT Services will have the new release installed (UAP6) by 5/15/2004. UAP6 will be ready to start testing by 5/17/04

5.4. SCT will deliver all Mods, that they are updating, by 6/19/2004

5.5. IT Services will release the MU Mods as they become ready for testing. See: MU mod testing checklist.

5.6. Offices will sign off on testing by 9/15/2004.

5.7. DARS version 3.5 and Corba Graphical interface will be available by 5/15.

5.8. Resources to test and sign off.

5.9. All existing interfaces to and from the Banner system will be evaluated for upgrade and tested.

5.10. Round the clock installation on the weekend of October 4.
6. Stakeholders to be Involved:

Project Sponsor: J Reid Christenberry
Project Manager: William Custer
Core Team: Kriss Cassano, Jen Collignon, Janet Cox, Mollie Hansel, Bill Heck, Becky Jolly, Denise Krallman, Celia Reuss, Brent Shock, Gary Steelman, Kate Stoss, Chris Worley, Jerry Wright, Bill Miley, Phyllis Wykoff, Dan Johnson, Aileen Engel, Nate Johnson

Steering Team: Dale Hinrichs, Chuck Kneple, Bob Kubat, Mike Mills, William Shawver, Gary Steelman, Jerry Wright

HR/Personnel/Payroll/Training Coordinator: Glenn Ellerbe, HR Systems and Technologies
Support Services, Administrative Support: John Goerke
1. Objective:

1.1. Develop a plan to create and manage responsive and secure systems that allow access to administrative information and facilitates informed university decisions. The system must include:

1.2. An effective organizational structure to assure quality support services and provide direction for decision support systems across the university.
- A university decision support system that focuses on data integrity and effective reporting support.
- By Dec 31, 2004 develop an implementation strategy for a pilot project to begin in Spring 2005
- Implement initial stages of pilot project.

2. Background & Narrative:

2.1. A critical issue arose during the internal environmental analysis involving the ability to access consistent current and historical information to facilitate university decision making. No consolidated university-wide effort has been undertaken to develop a decision support system or data warehouse to meet the needs of the university.

2.2. Several partial efforts have been undertaken, including purchase of the SCT Data Mart solution and development of files containing historical enrollment data. Portions of these may be incorporated into a comprehensive decision support solution.

3. References:

3.1. IT Strategic Plan Goal 5.3 Decision Support System and Reporting: Develop responsive and secure systems to access administrative information that facilitates informed university decisions. Implement an effective organizational structure to assure quality support services and provide direction for decision support systems across the university. Develop and implement a university decision support system that focuses on data integrity and effective reporting support.

4. Deliverables:

4.1. Assessment of the current decision support environment at Miami University.
   4.1.1. Assess current ad hoc reporting software and the availability of the software to meet the needs of clients requiring data.
   4.1.2. Assess current portal product to assure that there is client satisfaction with the product.
   4.1.3. Assess current data. Is it retrievable in its current form?

4.2. Needs assessment to enable quality and accurate decision support for Miami University.

4.3. Recommendations for architecture and characteristics of a decision support system.

4.4. Recommendations for infrastructure and support of a decision support system.

4.5. Recommended implementation plan for a pilot related to decision support.


5. Dependencies & Impacts:

5.1. Adequate resources for analysis, planning, and development of recommendations

5.2. Adequate hardware for the pilot
6. Stakeholders to be Involved:

- Bill Heck
- Ralph Gutowski
- Information users (including Brio, WebFOCUS, and MiNE listservs)
- HR/Personnel/Payroll/Training
- Glenn Ellerbe, HR Systems and Technologies Coordinator
- IT Services Senior Directors
- IT Services Data Administration
- IT Services Student and Business Teams
- IT Services Technical Services
- IT Services Support Services
- Departmental Advisors/Chairs
- CISC Senate Committee Representative
1. **Objective:**

   1.1. Develop and implement a university-wide plan for the effective and efficient use of Banner that includes system enhancements and ongoing service and support.

   **Phase 1:**


   **Phase 2:**

   1.3. Implement immediate improvements as recommended by April 30, 2005.

   **Phase 3:**

   1.4. Develop an ongoing model for the effective management and support of Banner at Miami by Feb. 28, 2005 with budget implications for FY2006.

2. **Background & Narrative:**

   2.1. The internal environmental analysis indicated that the use and support of the Banner system is need of significant improvements. Banner was implemented during the fall of 1999. Modifications were made to the system to support Miami business practices. Upgrading the system with modifications is problematic. In addition, Miami does not have centralized support and stewardship for the Banner system.

3. **References:**

   3.1. IT Strategic Plan Goal 5.2 Banner System Enhancement and Support: Consistent with imperative 5.1, implement a university-wide project to develop a plan for the effective and efficient use of Banner to include:

   - Centralized support and stewardship of Banner.
   - Full exploitation of the capabilities of Banner.
   - Reporting services.
   - Review of business processes to include optimization of services to students, faculty and staff.
   - Upgrades to Banner and removal of Miami-implemented modifications to Banner that are no longer needed.
   - Assessment of functionality required to reduce unnecessary shadow systems across the institution.
   - Ongoing user training.
   - Ongoing responsive service and support.

4. **Deliverables:**

   4.1. Assessment of the current university-wide use of the Banner system including, but not limited to:

   - Problem areas prioritized by criticality
   - Modifications made
   - Business practice analyses completed and/or needed
   - Additional needs from the system
   - Review of business processes to include optimization of services to students, faculty and staff.
   - Identification of additional features available in the Banner system appropriate for implementation at Miami.
   - Recommendations for upgrades to Banner and removal of Miami-implemented modifications to Banner that are no longer needed.
   - Assessment of functionality required to reduce unnecessary shadow systems across the institution.
4.2. Recommendation and implementation plan for immediate improvements.

4.3. Recommendation for a model to provide for:
   - Centralized support and stewardship of Banner.
   - Full exploitation of the capabilities of Banner.
   - Reporting services.
   - Ongoing user training.
   - Ongoing responsive service and support.

5. Dependencies & Impacts:

   5.1. Project #25: Banner 6 Implementation Project.

6. Stakeholders to be Involved:

   - IT Services
   - SCT
   - Users of the Banner System
   - Support Services, Administrative Support
   - HR/Personnel/Payroll/Training
   - Glenn Ellerbe, HR Systems and Technologies Coordinator
   - CISC Senate Committee Representative
   - John Goerke
Goal #6: Plan and Manage Information Technology

Project Information

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<tr>
<td>Date:</td>
<td>June 10, 2004</td>
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<td>Type:</td>
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1. Objective:

1.1. Develop and implement a comprehensive information technology governance model that encompasses information technology resources and units across the university.
1.2. Develop and implement a model for developing information technology policies within the governance structure.

2. Background & Narrative:

2.1. Currently, information technology policy and governance is distributed throughout the university. The need for more formalized approaches to policy and governance emerged during the internal environmental analysis.

3. References:

3.1. IT Strategic Plan Goal 6.1 Information Technology Policy and Governance

6.1.1 Information Technology Governance Model: Develop a comprehensive information technology governance model that encompasses information technology resources and units across the university.
- Assess the roles, responsibilities, overlap, and effectiveness of the wide range of committees and functional organizations addressing information technology issues.
- Develop recommendations for and implement a university governance structure for information technology.
- Formally implement new information technology advisory committees to ensure university-wide input and involvement.

6.1.2 Information Technology Policy Development Model: Develop a model for developing information technology policies within the governance structure.
- Assess the current means of developing and managing information technology policies and procedures.
- Explore ways of involving students, faculty, and staff in the identification and handling of information technology issues and concerns.
- Institute oversight and feedback mechanisms for students, faculty, and staff to review policy.

4. Deliverables:

4.1. Assessment of the roles, responsibilities, overlap, and effectiveness of the wide range of committees and functional organizations addressing information technology issues.
4.2. Recommendations for and implement a university governance structure for information technology.
4.3. Process for policy making.
4.4. Creation and implement of new information technology advisory committees to ensure university-wide input and involvement.
4.5. Assessment of the current means of developing and managing information technology policies and procedures.
4.6. Recommendations for ways of involving students, faculty, and staff in the identification and handling of information technology issues and concerns.
4.7. Recommendations for oversight and feedback mechanisms for students, faculty, and staff to review policy.
5. Dependencies & Impacts:
   5.1. CISC Senate Committee
   5.2. TSRs
   5.3. Student TAG
   5.4. PEC
   5.5. Regional Campuses (TLTR Middletown)
   5.6. Divisional Community

6. Stakeholders to be Involved:
   - Existing IT governance committees (senate and individual unit committees)
   - Regional Campuses
   - Glenn Ellerbe, HR Systems and Technologies Coordinator
   - Middletown: 1 student, 2 faculty, 1 computer center staff
   - TSRs
   - IT Services
   - Students
   - Chair, CISC
   - CISC, Entire Senate Committee
   - IT Services Senior Directors
   - Faculty
   - Staff
   - University Secretary
   - Hamilton – Kathleen Weber, Eloise Lafferty, Continuing Education and Business & Industry Center
1. Objective:

1.1. To operationalize the information technology strategic planning process and ensure ongoing and coordinated information technology planning that aligns with the goals of the university.

Phase 1:
1.2. Explore, develop, and recommend a model for ongoing operationalization of the IT planning process throughout Miami University by June 30, 2004.
1.3. Begin implementation of the model in July 2004 through a pilot project with the regional campuses and complete by October 31, 2005.
1.4. Assess the pilot project and adjust the model.
1.5. Implement the IT planning process model with the administrative and academic units by June 30, 2005.

Phase 2:
1.6. Continue the IT strategic and tactical planning process into FY05 including:
   - Environmental analysis
   - Revisit of the IT Strategic Plan
   - Development of tactical goals for FY06
   - Development of initial scope documents for prioritization and budgeting

2. Background & Narrative:

2.1. Miami University has completed a strategic planning for university-wide information technology. To ensure implementation of the plan, evaluation of the tactics, and ongoing planning efforts, IT planning must be operationalized and become a way of doing business for information technology at Miami.

3. References:

3.1. IT Strategic Plan Goal 6.2 Information Technology Planning
   6.2.1 Strategic Planning: Develop, gain approval for, and fully implement a university-wide information technology strategic plan with means for continuous improvement. Establish and implement an ongoing information technology planning process that continually assesses and evaluates information technology at Miami.
   6.2.2 Financial Planning: Prepare a long-range university information technology financial plan spanning operating, capital and development budgets, and incorporating long-term information technology needs.
   6.2.3 Quantitative Measurements: Develop quantitative measures that will assess the accomplishment of the strategic goals.
   6.2.4 Regional Campus Information Technology Plans: Partner with and support the regional campuses in the development of their information technology plans within the context of the overall university information technology plan to: 1) facilitate the individual mission of each campus, and 2) recognize points of integration and coordination with the university information technology plan.
   6.2.5 Unit Information Technology Plans: Ensure the college, schools, libraries, and administrative units develop information technology plans within the context of the overall university information technology plan to: 1) facilitate the individual mission of each unit, and 2) recognize points of integration and coordination with the university information technology plan.
   6.2.6 Communications: Develop and implement ongoing coordinated information technology communications and feedback mechanisms for students, faculty, and staff.
   6.2.7 Integration with University Planning: Ensure that information technology is integral to all major strategic planning efforts across the university.
4. **Deliverables:**

4.1. Approval of the IT Strategic Plan.
4.2. Approval of an ongoing IT planning process that fully integrates with the university planning and budgeting processes.
4.3. Quantitative measurements for the IT strategic plan.
4.4. Pilot project for IT strategic planning for units.
4.5. Regional campus information technology plans that are aligned with the overall plan.
4.6. Unit information technology plans that are aligned with the overall plan.
4.7. Communications mechanism for ongoing communications and feedback from students, faculty, and staff.
4.8. Environmental analysis
4.9. Updated (if necessary) IT strategic plan
4.10. Tactical goals for FY06
4.11. Initial scope documents for prioritization

5. **Dependencies & Impacts:**

5.1. IT Services Customer Advocacy Role
5.2. Communications Plan

6. **Stakeholders to be Involved:**

- IT Services
- CIO
- Senate Committee
- Middletown: TLTR Planning Action Team
- Director of Planning
- Technology advisory groups
- Regional Campuses
- IT Services Senior Directors
- IT Strategic Planning Steering Team (Vice Presidents)
- Glenn Ellerbe, HR Systems and Technologies Coordinator
1. Objective:
   1.1. Explore, develop, and recommend an IT Services/CIO Management System.
   1.2. Develop phased-in implementation.
   1.3. Begin implementation.

2. Background & Narrative:
   2.1. With the addition of the CIO position at Miami University, a comprehensive management system is critical to effective management of information technology across the university.

3. References:
   3.1 **IT Strategic Plan Goal 6.3: Information Technology Operations and Management**: Establish an information technology operational environment that aligns operations and management of information technology across the university and is adequately supported so that:
   - Costs are effectively managed.
   - Services have the resources required.
   - Resource alternatives are explored.
   - Resources are shared and used to their maximum potential.
   - Collaboration is a priority.
   - Services are continually assessed and improved.

   3.2 **IT Strategic Plan Goal 6.4: Information Technology Staffing, Development, and Management**: Develop and implement an information technology staffing and development plan including common job descriptions, professional development, career path development, and ongoing training.

4. Deliverables:
   4.1. Recommendation and phased implementation plan for a CIO management system.

5. Dependencies & Impacts:
   5.1. IT Strategic Plan: Goal 6.

6. Stakeholders to be Involved:
   - Reid Christenberry
   - Debi Allison
   - John Goerke
   - Kathie Brinkman
   - Beth Farthing-Moore
   - Nate Johnson
   - Carolyn Gard
1. **Objective:**
   1.1. To assist Miami University's IT Services in the development of best practices in project management and to lead by example in the application of those practices.

2. **Background & Narrative:**
   2.1. Project Management resources will enable the Information Technology Services staff to effectively and efficiently manage projects on the Miami University campus. The Project Office (PO) will provide the tools and guidance necessary to establish successful project management by:
   - Establishing project management methodology, change management methodology and metrics;
   - Establishing a single repository of project information and project reporting;
   - Providing internal consulting and mentoring to IT Services staff on project management practices.
   - Implementing a Resource Management tool.

3. **References:**
   3.1. **IT Strategic Plan Goal 3.3.1 Coordination and Management of Projects:** Improve internal coordination and management of projects, including more formal coordination across division groups and increased communication and engagement with the university community.
   3.2. **IT Strategic Plan Goal 6.3 Information Technology Operations and Management:** Establish an information technology operational environment that aligns operations and management of information technology across the university and is adequately supported so that:
   - Costs are effectively managed.
   - Services have the resources required.
   - Resource alternatives are explored.
   - Resources are shared and used to their maximum potential.
   - Collaboration is a priority.
   - Services are continually assessed and improved.

4. **Deliverables:**
   4.1. The goal of the PO is to generate enthusiasm for the project management process and to see improved reliability and repeatability in our project efforts.
   4.2. Some expected **measurable results** include:
   - Projects delivered on time or before schedule.
   - Projects completed within or below budget and resource allocation.
   - Projects have minimal or mutually agreed upon scope changes.
   4.3. Some expected **benefits** include:
   - Improved quality of products and services resulting in higher satisfaction of customers.
   - Increased involvement from functional areas and business units.
   - Process for identifying key dependencies across projects.

5. **Dependencies & Impacts:**

6. **Stakeholders to be Involved:**
   - IT Services
   - IT Services Senior Directors
   - Stakeholders for IT projects facilitated through the PO
7. Objective:

7.1. Explore, develop, and recommend a technology-funding model to be implemented in FY06.

8. Background & Narrative:

8.1. Miami University currently does not have a specific technology-funding model to help ensure the ongoing currency and refreshment of information technology for the university. This project would be led by the CIO/VP for information technology.

9. References:

9.1. IT Strategic Plan Goal 6.2.2 Financial Planning: Prepare a long-range university information technology financial plan spanning operating, capital and development budgets, and incorporating long-term information technology needs.

9.2. IT Strategic Plan Goal #6.3 Information Technology Operations and Management: Establish an information technology operational environment that aligns operations and management of information technology across the university and is adequately supported so that:

• Costs are effectively managed.
• Services have the resources required.
• Resource alternatives are explored.
• Resources are shared and used to their maximum potential.
• Collaboration is a priority.
• Services are continually assessed and improved.

10. Deliverables:

10.1. Assessment of current technology funding at Miami University.
10.2. Review of technology funding models at other higher education institutions.
10.3. Recommendation of a technology-funding model for Miami University.

11. Dependencies & Impacts:

11.1. Project #29: Continuous Information Technology Planning Implementation
11.2. Project #28: Information Technology Policy and Governance Project

12. Stakeholders to be Involved:

• VPs
• OARS
• Middletown: Rod Nimtz, Kelly Cowan, 1 faculty, 1 student
• University-wide IT services and support areas
• IT Services Senior Directors
1. Objective:
   1.1. To effectively orient and integrate the new IT Services management team for effective management of IT Services and the ongoing implementation of the IT Strategic Plan.

2. Background & Narrative:
   2.1. With the addition of the VP for Information Technology role at Miami University, a new management structure is being implemented for IT Services. Senior Director positions have been added, and these positions have been posted and the hiring is underway. The new management team will consist of existing IT Services employees as well as employees new to IT Services and Miami University. To bring the management team together for effective planning and management of IT Services, focus on the team building and orientation of the new team will be necessary.

3. References:
   3.1. IT Strategic Plan Goal 6.2.2 Financial Planning: Prepare a long-range university information technology financial plan spanning operating, capital and development budgets, and incorporating long-term information technology needs.
   3.2. IT Strategic Plan Goal #6.3 Information Technology Operations and Management: Establish an information technology operational environment that aligns operations and management of information technology across the university and is adequately supported so that:
       • Costs are effectively managed.
       • Services have the resources required.
       • Resource alternatives are explored.
       • Resources are shared and used to their maximum potential.
       • Collaboration is a priority.
       • Services are continually assessed and improved.

4. Deliverables:
   4.1. Integration of the new IT Services management team into the following:
       • Miami University
       • IT Services’ project management philosophy and processes
       • IT Strategic and Tactical Plans
       • IT Strategic and Tactical Plans Operationalization Processes
       • Resource Planning Model
   4.2. Development of the IT Services Management Team with the following characteristics:
       • Led by a vision and mission
       • Teamwork orientation
       • Acceptance of best practices
       • Strategic and tactical focus
       • Strong and effective communications skills
       • Effective relationships with the University community
       • Effective resource management
       • Ability to meet team goals and objectives
5. Dependencies & Impacts:
   5.1. Cornelius & Associates for leadership team development
   5.2. IT Services employees for IT Services orientation
   5.3. VP for Information Technology

6. Stakeholders to be Involved:
   Senior Directors
   IT Services employees
   VP for Information Technology
   Cornelius & Associates
1. Objective:
   1.1. To continue the work started in FY04 to improve performance management and teamwork and leadership skills within IT Services.

2. Background & Narrative:
   2.1. During FY04, the following three objectives were achieved:
       • Develop and help implement a performance management system for IT Services
       • Design and deliver training skills development workshops in selected management and leadership skills.
       • Develop job descriptions for all IT Services jobs
   2.2. With the completion of these objectives, an ongoing audit process for the performance evaluations will help ensure the effectiveness of these initiatives.
   2.3. Additional training will be required to further develop teamwork and leadership skills within IT Services.

3. References:
   3.1. FY04 Cornelius & Associates Contract and extension
   3.2. Future contract and recommendations

4. Deliverables:
   4.1. Leadership Team Development
       • Specific retreat and leadership team building activities
       • Leadership team facilitation for development of vision, mission, and goals
       • One-on-one coaching
       • Facilitation to achievement of goals
   4.2. Continuation of performance management training as needed with quarterly audits
   4.3. Teamwork and leadership development training

5. Dependencies & Impacts:
   5.1. Hiring of senior director positions
   5.2. Acceptance of C&A contract and recommendations

6. Stakeholders to be Involved:
   VP IT Services
   Beth Farthing-Moore
   IT Services Employees
   Debi Allison
1. Objectives:

1.1 To operationalize the investigations into technological advancements in the infrastructure that leverage the computing, telephony, and converged telecommunications environments, as integral activities within the information technology strategic planning process, while ensuring an alignment with the goals of the university enterprise, as follows:

**Phase 1**

1.1.1 Investigate, benchmark, and recommend, if and as appropriate, telephony service offerings that increase the value proposition to the client community, through the deployment of Automatic Call Distribution (ACD), Interactive Voice Recognition (IVR), wireless LAN appliances, voice over Internet protocol (VOIP), expanded cellular telephone, and/or other equivalent advancements by March 31st, 2005.

**Phase 2**

1.1.2 Commence the implementation of the approved initiatives on, or by, July 31st, 2004.

**Phase 3**

1.1.3 Investigate, benchmark, and recommend, if and as appropriate, various other infrastructure features and functions that increase the value proposition to the client community through the service offerings afforded by Kerberos, “Email for Life”, the expansion of the name/account identification code, furnishing network connectivity to the regional campuses communities that are equivalent to that experienced by the Oxford community, and/or other equivalent capabilities on, or by, March 31st, 2004.

1.2 Continue to incorporate technological investigations into the annual fiscal year process of IT strategic and tactical planning:

1.2.1 Environmental analysis
1.2.2 Revisit of the IT Strategic Plan
1.2.3 Development of tactical goals for FY06
1.2.4 Development of initial scope documents for prioritization and budgeting

2. Background & Narrative:

2.1 Miami University has completed a strategic planning for university-wide information technology. To ensure continuous leveraging and implementation of the strategic planning process, technological investigations must become integral activities within the process.

2.2 The environmental analysis has highlighted the client community’s desire and preference for more comprehensive functionality emanating from and within the current infrastructure.

3. References:

3.1 IT Strategic Plan Goal 6.2 Information Technology Planning

6.2.1 Strategic Planning: Develop, gain approval for, and fully implement a university-wide information technology strategic plan with means for continuous improvement. Establish and implement an ongoing information technology planning process that continually assesses and evaluates information technology at Miami.

6.2.2 Financial Planning: Prepare a long-range university information technology financial plan spanning operating, capital and development budgets, and incorporating long-term information technology needs.

6.2.3 Quantitative Measurements: Develop quantitative measures that will assess the accomplishment of the strategic goals.

6.2.4 Regional Campus Information Technology Plans: Partner with and support the regional campuses in the development of their information technology plans within the context of the overall university information technology plan to: 1) facilitate the individual mission of each campus, and 2) recognize points of integration and coordination with the university information technology plan.
6.2.5 Unit Information Technology Plans: Ensure the college, schools, libraries, and administrative units develop information technology plans within the context of the overall university information technology plan to: 1) facilitate the individual mission of each unit, and 2) recognize points of integration and coordination with the university information technology plan.

6.2.6 Communications: Develop and implement ongoing coordinated information technology communications and feedback mechanisms for students, faculty, and staff.

6.2.7 Integration with University Planning: Ensure that information technology is integral to all major strategic planning efforts across the university.

4. Deliverables:

4.1. Proposed technological initiatives, encompassing all capital and ongoing costs, and the delineated value propositions

4.2. Approval of the technological investigations as integral to the strategic planning process.

5. Dependencies & Impacts:

5.1. IT Services Customer Advocacy Role
5.2. Communications Plan

6. Stakeholders to be Involved:

- CIO
- IT Services Sr. Directors
- University Security Officer
- Technology advisory groups
- Regional Campuses
- IT Strategic Planning Steering Team (Vice Presidents)
- Faculty/Administrative Governance
- Regionals Campuses