Taking Care of Business: Aligning IT with Institutional Priorities

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Chicago, IL 2019
University ↔️ City

Many different functions

  Requiring

Many different services

  Satisfying

Many different customers

  Depending

On the time of year, day of week, etc.
University ↔️ City

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On the time of year, day of week, etc.
ALUM vs ADM vs E&I vs ITS

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On the time of year, day of week, etc.
ACAF vs COMM vs FINA vs STU

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What to Do??

Many different functions

*Requiring*

Many different services

*Satisfying*

Many different customers

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On the time of year, day of week, etc.
Your Mission...(should you choose to accept it...)?

SAVE GUMBY!!!
Do some research! Like, read these two good books:

1. *Measure What Matters* by John Doerr
2. *The Three Box Solution* by Vijay Govindarajan
Key Concepts

Objectives and Key Results (OKRs)

Objectives (WHATs): Tangible, unambiguous, obvious when achieved, aggressive but realistic

Key Results (HOWs): Measurable milestones, describe outcomes not activities, include evidence of completion

OKRs are shared publicly, frequently revisited, often cross-team
Key Concepts

BOX 1: PRESENT – Optimize core functions

(Vishnu - god of preservation)

BOX 2: PAST – let go of old practices, habits, activities, and attitudes

(Shiva – god of destruction)

BOX 3: FUTURE – Try new things, pilot new ways of working, failure expected

(Brahma – god of creation)
There has to be a better way...
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Traps

TRAP #1: Failing to differentiate between committed and aspirational OKRs.

TRAP #2: Business-as-usual OKRs.

TRAP #3: Timid aspirational OKRs

TRAP #4: Sandbagging

TRAP #5: Low Value Objectives (aka the “Who cares?”)

TRAP #6: Insufficient KRs for committed Os.
Initial reaction

How does this apply to me?

Shiny new tool for Same Old S___.

Project oriented or transactional?

Are we the only ones doing this?

How do my OKRs relate to ITS OKRs in memo to Board?

Relationship to performance reviews?

Maintenance is required (vs. "Set it and forget it"). Grrr!
Observations on a Work in Progress

❖ Excel – limitations as a tracking tool
❖ OKRs change (dates, people, priorities)
❖ Staffing changes can orphan OKRs
❖ OKRs force conversations about priorities
❖ OKRs encourage collaborations to achieve shared objectives
❖ Public sharing and regular review is important
❖ This appeals more to IT departments than other departments (we are more motivated to save Gumby than our colleagues), but there is adoption across campus (e.g. Finance and Administration, Communications, etc.)
Regular reviews + ratings = actions to improve

<table>
<thead>
<tr>
<th>GOAL</th>
<th>ACTIVITY</th>
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<tr>
<td>Deploy Multi-Factor Authentication (MFA) for O365, WesPortal &amp; VPN by June 30, 2019</td>
<td>Enable OPT-IN MFA for all Wesleyan accounts via a smartphone app</td>
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<tr>
<td>Implement Vulnerability Management Program by December 31, 2018</td>
<td>Define server hardening / security baselines for Windows &amp; UNIX by</td>
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<td>Develop metrics to track and report trends on vulnerabilities by Dec</td>
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<td>Implement the Next-Gen firewall features of the Palo Alto firewalls by</td>
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<td></td>
<td>Implement vulnerability management procedures for Windows &amp; Unix by</td>
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<td>Move at least 50% of the Windows servers to patch automatically by</td>
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<tr>
<td>Reduce Personally Identifiable Information (PII) on unapproved systems by 50% by June 30, 2019</td>
<td>alert &amp; block SSN from being sent via email by June 30, 2018 for fac</td>
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<td>Choose software to manage PII mitigation by March 31st.</td>
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<td>Implement updated PII mitigation procedures by June 30th.</td>
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<td></td>
<td>Perform business analysis on current PII mitigation procedures to de</td>
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Value?
A Framework to Prioritize...
Focus energy on institutional priorities.
Reduce tension that may arise from what seem like conflicting priorities.

Position IT as a strategic ally that is engaged at the outset and not just to execute technology.

Engage the IT organization in the institutional vision.
Lessons Learned

TIMING OF IMPLEMENTATION (START NOW, NOT IN AUGUST!)

EXECUTIVE ALIGNMENT MATTERS...

START WITH WILLING PARTICIPANTS, THEN...

STRIVE FOR BUY-IN FROM ALL CABINET AREAS

WORK ALL THREE BOXES FOR EACH PRIORITY AREA

NO ONE GETS IT RIGHT THE FIRST TIME (OR TWO, OR THREE...)
Wesleyan University