

Beyond the Rhetoric: A Midterm Appraisal

Clearly, those of us in higher education must learn from the business world's experience. We must implement well-thought-through tactical plans that husband our resources on much tighter budgets. And although it is tempting to lose ourselves in endless planning and rationalizations, it is vital that we move beyond the rhetoric and address the tasks that institutional and IT leaders must execute together.

—Leo I. Higdon Jr., “Moving Beyond the Rhetoric,” *EDUCAUSE Review*, November/December 2002

Getting bogged down in lengthy, complex, and confused technology planning is one of the more expensive—and potentially self-defeating—exercises an institution can undertake.

—Martin Ringle and Daniel Updegrove, “Is Strategic Planning for Technology an Oxymoron?” *Cause/Effect*, 1998

When I urged institutional and IT leaders to “move beyond the rhetoric” in my Leadership column published in *EDUCAUSE Review* in 2002, I had worked with IT initiatives at two previous institutions of higher education and was preparing, as president, to lead a third. In that earlier article, I addressed the rapidly changing atmosphere in which higher education IT was evolving and the need to align the IT plan with the strategic direction of the institution in order to effectively move the institution forward. From there, I shared certain steps that college and university leaders could take in ensuring effective IT management for their institution: (1) creating a detailed IT operating plan; (2) gaining consensus among IT and academic management; (3) defining and

utilizing metrics and data; (4) communicating the plan; (5) staying focused; and (6) weighing criticism.

At the time, the College of Charleston was developing a comprehensive strategic technology plan to coordinate the increasing number of technology-enhancement efforts that were under way and to ensure that faculty, staff, and students were fluent in both current and emerging technologies. Now, two years into implementation of the plan, I'm struck by both the increasingly fast pace of IT development and the enormous challenges facing higher education managing that development. And though we've made remarkable progress with our IT planning and implementation at the College of Charleston, I'm always aware of how easy it is to fulfill Ringle and Updegrove's description of an “expensive” and “potentially self-defeating” exercise.

Part of our plan to avoid a quagmire is to recognize that developing and implementing an effective strategic technology plan is an ongoing, dynamic process that needs continual reassessment. Gauging how far we've come is relatively easy; determining that we're on the right track, especially given changes in technology and the shifting nature of higher education funding, is not as easy. But because the maintenance of an effective IT infrastructure is an ongoing process, it is important to step back, both formally and informally, and examine issues whose relative weight and priority may have changed. As one part of this informal assessment, I polled members of both the university and the IT leadership teams on which issues of the planning process they would target as being among the most critical. In

other words, if we were to give a midterm exam on the strategic technology planning project to date, what points would they reemphasize?

1. Internal Communication

The issue of communication was repeatedly cited as the most critical factor in determining the overall success of an IT plan. Apparently, good communication is easy in theory but much harder in practice. And communication among stakeholders needs to go much further than a few well-placed e-mails. Instead, a good internal communications plan needs to be as carefully constructed as the strategic technology plan it's accompanying. Users need to understand not only the objectives of the strategic technology plan but also how this plan will support the overall mission and vision of the university. In other words, the big picture has to make sense before there can be buy-in and support from the various constituencies.

From there, the communications plan can drill down to the specific questions: What services will be available? What exactly will this new technology do for me, as a stakeholder? What changes should I expect, and most important, how will these changes affect the way I do my job? In addressing these questions, the communications plan has to take into account the different perspectives of the constituencies being affected.

This is not a case where “one size fits all.” The stakeholders need information, and they need the information on the level that is appropriate and necessary to their particular IT usage and success. For example, students will need a different level of communication than will faculty

and staff; senior administrators will need a different level of communication than will IT programmers and analysts; administrative end users will need a different level of communication than will departmental users. Often these differences relate less to technological savvy and more to what a particular group requires, whether students, faculty, or administrators. Strategic technology planning is not simply a matter of highly specialized hardware purchases. It is foremost an education in how campus technology and resources can best be utilized.

Good communication involves more than an explanation of what's going to happen with a particular technology plan. It also sets up realistic expectations and defines each group's responsibilities. It establishes goals, tasks, timelines, metrics for measuring progress, and regular, easily understood status reports. Obviously, the communications starting point will be different for everyone, with a wide range of IT fluency and perspectives among students, faculty, and staff. But good communication with all stakeholders at every level will go a long way in achieving consensus, commitment, and engagement with the IT plan and will set processes in place for ongoing development.

2. Recurring Funding

For most organizations, the need for recurring funding would seem obvious, but the scale of expenditures and the short life-span of software solutions still take many institutional leaders by surprise. Replacements, upgrades, existing technology needs—all of these make IT an ongoing consideration of an institution's budget even before the logistics of a new



Illustration by Steve McCracken. © 2006

technology initiative are addressed. In addition, the cost of training and personnel development and software maintenance is always more than expected. Particularly draining to an institution's budget is the decentralized approach to technology solutions, in which departments are forced to operate independently to meet their software and hardware needs. The disparate technologies and resources that result can make a campus-wide strategic technology plan that much harder and more costly to implement.

The recurring nature of IT expenditures does not translate into an open-ended budget; instead, it calls for the recognition that financial needs in IT will fluctuate. Fiscal conservatism in any institution is necessary, but there needs to be enough flexibility to allocate funds as necessary, with unused resources going back into the pool for use later. Therefore, realistic financial considerations should always be at the forefront of the planning process. And this will also have to be com-

municated to the appropriate stakeholders and be specifically addressed within the context of the institution's overall strategic plan. Funds for unforeseen expenses and new projects will also need to be budgeted. But with realistic financial planning and institutional oversight, problems will be less expensive and the IT infrastructure will be easier to maintain.

3. Transparent and Collaborative Decision-Making

It is critical that the planning process include all constituencies that will be affected and that their opinions are valued, respected, and addressed from the very beginning. If the institution's stakeholders are fully represented and kept informed, there will be more support of the strategic objectives, as well as active engagement with implementation of the plan. Once this consensus is reached, the technical details of how best to execute the strategic plan can be entrusted to the IT team. This collaborative effort will ensure that there is a clear understanding of roles and expectations *before* actual execution of the plan. And keeping the process transparent, with regular reports and immediate notification of problems that are encountered, will help avoid larger setbacks later.



In the end, the success of an institution's strategic technology plan will be in direct proportion to the support for the plan among its constituents. Communication, appropriate funding, and inclusive decision-making are crucial elements in securing that support. As the environment for higher education becomes more complex, and as the opportunities offered by new technologies expand, it is more important than ever that institutional IT leaders see strategic technology planning as a holistic, rather than a specialized, undertaking—one that not only will help us achieve our institutional objectives but also will serve as an integral and indispensable part of our education as a whole.



Leo I. Higdon Jr. is President of the College of Charleston.