

# THE UNIVERSITY OF MEMPHIS<sup>®</sup>

## Information Technology Services Strategic Plan

Revised September 2022

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## Executive Summary

The University of Memphis (UofM) is changing rapidly, adapting to institutional challenges and opportunities with fresh vigor and an ambitious strategic plan. Responsible for the data and information infrastructure underpinning these changes, Information Technology Services (ITS) must be agile, finding new solutions to fit new contexts and retiring solutions designed for previous strategies. The Information Technology Strategic Plan (ITSP) identifies the steps the division will undertake to support the University's direction of the next five years.

## Environmental Scan

The following characteristics describe the environment in which ITS seeks to support the academic and research mission of the University through transformative change while maximizing resource efficiency:

- Infrastructure demands (e.g., on-premise, cloud, common and specialized resources)
- Portfolio growth and employee workloads (e.g., applications, services, etc.)
- Security and risk management needs
- Budget constraints
- Agile collaboration efforts (e.g., process improvement)

## ITS Strategic Initiatives

ITS has identified the following strategic initiatives for the next 5 years that will support the University's mission:

- Expanding support for student success initiatives
- Improving technology adoption and training
- Supporting business automation and efficiency
- Enhancing support for online learning and UM Global initiatives
- Collaborating on digital marketing, constituent engagements, and constituent experiences
- Strengthening IT infrastructure resilience and security
- Improving support for end-user analytics
- Increasing use of contractors and vendor managed services
- Deploying smart campus technologies
- Exploring innovative solutions for research and other special needs

The university is poised to enable and leverage further adoption of cloud-based services to support transition from CAP-EX to OP-EX, strengthen disaster recovery processes, and move toward service delivery anywhere anytime. Further investments in supportive technology and professional development are anticipated.

Because the University environment is rapidly transforming, this ITSP is reviewed and adjusted as needed in response to tactical needs including changing technologies, needs of constituents, environmental threats, and internal measurements collected by ITS.

## ITS Overview

ITS provides core educational, research, and business technologies and services that enable the university to achieve its ambitions. ITS is responsible for implementing, monitoring, and maintaining all centralized information technology such as the campus data network, telephone system, computer systems, computer labs, data centers, servers, enterprise applications such as ERP and CRM systems, and Service Desk functions at the University of Memphis. And, while some units acquire decentralized technologies, ITS provides integration, support services, and training opportunities for many of the technologies used or proposed to the campus community.

## Vision

ITS drives transformational change at the University through collaboration with internal and external peers to support student success, research, innovation, and sustainability.

## Mission

ITS is committed to providing excellent service to students, faculty, researchers, and staff in support of the University's mission.

## Values

The values below define our organization and support our mission:

- We put students first.
- We listen and respond to the needs of others.
- We conduct ourselves with professionalism, integrity, and accountability.
- We provide comprehensive and reliable service to do the job right the first time.

## ITS Strategic Planning Process

Strategic planning is a critical component of the ITS continual improvement process. To inform the planning process, we continually seek input from customers about satisfaction and service quality, solicit input from academic and administrative leadership, and consult with IT governance bodies. To create the ITSP, we combine that input with an environmental scan and an internal SWOT (strengths, weaknesses, opportunities, and threats) analysis. Because the institution's needs and the technology environment constantly evolve, the ITSP is a living document.

### Environmental Scan

The external environment is characterized by the growing importance of:

- Operational rather than capital expenditures -- vendors will continue deploying cloud-based solutions, including platform-as-a-service (PaaS) and Software-as-a-Service (SaaS) and will pursue customer lock-in through cloud-based hosting agreements, increasing institutional switching costs of future migrations. Pressure will mount for further cloud-based provisioning, and new skills will be needed to support cloud-based services for generic infrastructure and specialized business, academic, and research activities.
- Data Strategy -- adoption of niche products will require additional effort to integrate with existing systems and to leverage data collection and analysis using integration platform as a service (iPaaS). This trend will require the institution to implement a strategy for coordinating among multiple systems of record, for data abstraction to ensure retention of data during vendor switching, and for providing a single, authoritative source for analytics and reporting. Master data management will be an important consideration.
- Digital Twin – the digitalization of the higher education social and academic experience will continue, thereby requiring institutions to re-think service delivery throughout the entire constituent lifecycle including marketing, experience management, data analytics, and decision-making strategies.
- Mobile technology and IoT utilization - further investments in network infrastructure, security, and support as well as applications for Deep Learning, machine learning, and artificial intelligence will be driven by further growth of mobile and IoT (Internet of Things) technologies.

The internal environment is characterized by:

- Emerging, independent business initiatives – expectations for faster project deployments and ad hoc projects with limited stakeholder involvement increase pressure on limited resources thereby creating an opportunity to align project prioritization with University strategic priorities.
- Customer capability and maturity concerns – insufficient succession planning and cross training, as well as lack of training for existing applications and lack of knowledge for compliance requirements, creates an opportunity for strengthening institutional knowledge.
- Funding model inefficiencies – charge-back models create potential for inefficient business processes, technology student fees provide inadequate funding for technology in academic programs, and reliance on auxiliary subsidies create uncertainty for ITS budget planning, thereby creating opportunities for re-envisioning existing funding models.
- Organizational and cultural challenges – SaaS, IaaS, iPaaS, and other cloud-based IT service models create opportunities for realignment of resources and cultural expectations needed to support these new operating modalities (e.g., SaaS may increase the frequency of service updates requiring functional units to be more agile in testing and learning new features).

- Deferred physical and technical maintenance -- opportunities exist to avoid future capital investments related to physical plant issues and to address deferred technical costs (e.g., fiber upgrades).

Table 1 (“Rates of Change”) illustrates the rate of change of the university infrastructure supported by ITS and the related financial support:

Table 1: Rates of Change

Description	Five-Year Changes <sup>1</sup>
Network ports	64% increase
Wireless access points	26% increase
Storage capacity – research	0% increase
Desktop computers	16% increase
Security Cameras	20% increase
ITS operating budget	1% decrease <sup>2</sup>
TAF budget	19% increase
ERP budget	9% increase

Without exception, the success of every new academic, research, partnership, and business initiative depends on information technology infrastructure, daily operational activities, enterprise applications, and service desk support.

### SWOT Analysis

For this strategic plan, ITS analyzed customer feedback and engaged in self-reflection to create the SWOT analysis in Table 2. The SWOT analysis helps us identify strengths, weaknesses, opportunities, and threats.

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<sup>1</sup> Infrastructure and service support information based on data from FY2018-2022.

<sup>2</sup> Based on base budget

Table 2: SWOT Analysis

<b>SWOT Analysis</b>	
<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• We are a talented team and knowledgeable about the services we provide.</li> <li>• We are available and responsive in supporting our services during peak and non-peak hours.</li> <li>• We are flexible and adaptable.</li> <li>• We have a solid technical infrastructure.</li> <li>• We strive to provide excellent customer service.</li> <li>• We support University community partnerships.</li> <li>• We communicate broadly across the institution at multiple levels using a variety of mediums and the IT Governance structure.</li> </ul>	<ul style="list-style-type: none"> <li>• Increase investment in research and development.</li> <li>• Improve resource management by prioritizing projects in support of University strategic goals.</li> <li>• Resource contention occurs between ESAC, PMG, project management, and executive-level out-of-band requests.</li> <li>• Unsustainable charge-back revenue model and dependency on auxiliaries used to fund Network Services and related functions.</li> <li>• Dependence on superstar staff in ITS and in functional areas.</li> <li>• Some services provided by ITS are supported one-deep due to inadequate staffing levels.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Improve cybersecurity by continuing to enhance our Information Security program.</li> <li>• Collaborate with constituents on technology purchases before they are made.</li> <li>• Collaborate with Procurement to develop and implement controls for technology purchases.</li> <li>• Improve resource management by sunseting legacy services.</li> </ul>	<ul style="list-style-type: none"> <li>• Inadequate stakeholder involvement, project planning, and compressed timelines.</li> <li>• External partnerships that require significant support.</li> <li>• Enrollment trends impact TAF revenue making that funding model unsustainable.</li> <li>• The University lacks an enterprise desktop computing replenishment strategy.</li> <li>• Competitors’ compensation levels, combined with remote work policies, jeopardize staffing stability in ITS and across the institution.</li> </ul>

## ITS Strategic Priorities

ITS relies heavily on its advisory bodies for planning, coordination, and communication. Additionally, ITS identifies future technology trends in higher education from a variety of sources including peer institutions, Gartner, and Educause. ITS identifies potential areas of opportunity by constantly scanning these sources, communicating with institutional leadership, and supporting professional development of staff.

## Major Initiatives

To support the university in achieving its ambitions, we anticipate the following major initiatives over the next five years, and specific tactical projects are listed in the roadmap later in this document:

1. One or more major ERP-related implementations
2. A large-scale migration of the data center architecture and infrastructure to the cloud
3. A transition from traditional desktop computing hardware to virtual desktop infrastructure (VDI)
4. Strengthen digital marketing strategy by redesigning constituent engagement from recruitment through alumni phases to create a consistent experience that leverages data collection, analysis, and informed decision-making
5. Reimplementation of the data warehouse to accommodate the business intelligence and decision support needs of the university, including machine learning and artificial intelligence, while shifting ERP and CRM resources and incorporating beacon and other IoT “smart campus” devices
6. Coordinate elements of the technology ecosystem to support UM Global and other online learning initiatives such as blended learning and hybrid course experiences
7. Improve operational efficiencies by leveraging electronic signature and workflow technologies
8. Extend information security program to strengthen new technology deployment and academic/research activity
9. Increase speed to delivery through pursuit of cloud-based strategies
10. Conduct enterprise resource planning platform review and potential refresh in collaboration with business units, including a review of existing business processes and cloud-based solutions
11. Collaborate with business units to improve efficiency by identifying needed changes to business processes, organizational design, and technologies
12. Pursue smart campus strategies to support sustainability, external collaboration, and improvement of the constituent experience
13. Implement a data analytics strategy that shifts ad hoc reporting to business units, and creates a business intelligence unit focused on leveraging data analytics
14. Implement a data strategy that promotes good data governance, stewardship, security, privacy, and authority



## Strategic Challenges

Strategic challenges anticipated for these initiatives include:

1. Talent challenges brought on by:
  - a. Increased competition with local marketplace for talent exacerbated by low compensation levels.
  - b. Because of application diversity and limited staffing, high-quality support for many products and technologies is one person deep both in functional offices and ITS.
  - c. Any ERP or CRM implementation is likely to spark staff departures, creating a greater gap in business process knowledge.
  - d. New ERP and CRM skills, especially if related to a system used outside of higher education, will result in greater market pressure for talent.
  - e. High levels of retirement eligibility within a five-year horizon for both ITS and functional areas.
2. Fiscal challenges brought on by:
  - a. Decentralized, non-institutional operating budgeting for campus-wide concerns, such as security cameras, network drops, managed switches, access systems, telephone billing, software (e.g., work-order systems), and staff training.
  - b. Deferred physical and technical maintenance will require collaboration from institutional leaders to decommission obsolete or inefficient services rapidly.
  - c. Annual ad hoc funding for multi-year agreements.
3. Institutional capability and maturity challenges brought on by:
  - a. Critically low levels of maturity, capability, and succession planning in ITS's campus partners create sudden, critical gaps in business continuity and diminish institutional potential.
  - b. Institutional capability and maturity deficiencies related to existing technologies and adoption requiring training to use the ERP system more effectively and increase the slate of products that use these ERP functions.
4. Organizational and cultural challenges brought on by:
  - a. Institutional siloes of information, technologies, strategy, and planning create unforeseen crises for implementation and interoperability.
  - b. Ineffective participation in some governance committees creates problems for ITS in meeting strategic priorities.
  - c. Misalignment of cross-division strategies creates internal competition and contention for limited resources resulting in institutional and enterprise inefficiencies.

## Project Roadmap

Table 3 illustrates tactical projects that will support UofM Strategic Priorities during the next two to three years. Projects created in response to agile business needs and collaboration opportunities, as well as projects needed to support the previously defined ITS strategic initiatives, will be defined throughout the horizon as needed.

**Table 3: ITS Tactical Projects by Fiscal Year Supporting UofM Strategic Priorities**

Fiscal Year	ITS Tactical Project	UofM Strategic Priority						
		Student Success, Access, & Affordability	Academic Excellence	Research & Innovation	Diversity & Inclusion	Community, Alumni, & External Collaborations	Brand Enhancement & Global Visibility	Sustainability
2023	Distributed Antenna System / 5G plan	X	X	X		X	X	X
2023	Upgrade Internet2 100g		X	X			X	
2023	Data Strategy	X	X					X
2023	Portal replacement	X	X				X	X
2023	VOIP cloud migration							X
2023	Audio/Visual over IP expansion	X	X	X				X
2023	Cloud-based HPC expansion			X				X
2023	CMMC certification		X	X				X
2023	Digital Signage initiative					X	X	X
2023	Data center cloud migration					X		X
2023	ERP update	X	X	X				X
2023	Facilities software migration							X
2023	Campus fiber upgrade – Phase 5		X	X				X
2023	Music building construction	X	X	X		X	X	
2023	IPv6 Pilot / Proof of Concept			X				X
2023	Research Computing Center		X	X				X
2023	Smart Campus initiative	X	X	X	X	X	X	X
2023	HPC Upgrade		X	X				X
2023	STEM building construction	X	X	X		X	X	
2023	VDI standardization	X	X					X
2023	Cloud-based telephony Phase 1							X
2024	Data lake implementation	X	X				X	X
2024	Data Center network upgrade							X

		<b>UofM Strategic Priority</b>						
<b>Fiscal Year</b>	<b>ITS Tactical Project</b>	<b>Student Success, Access, &amp; Affordability</b>	<b>Academic Excellence</b>	<b>Research &amp; Innovation</b>	<b>Diversity &amp; Inclusion</b>	<b>Community, Alumni, &amp; External Collaborations</b>	<b>Brand Enhancement &amp; Global Visibility</b>	<b>Sustainability</b>
2024	Campus fiber upgrade – Phase 6		X	X				X
2024	Cloud-based telephony – Phase 2							X

## Summary

From context, process, priorities, challenges, and projects, this technology strategic plan articulates the rationale for the next five years while also identifying tactical opportunities in the more immediate future. The context for the plan describes the external and internal forces shaping the options available to the institution, and potential challenges the institution must address to successfully implement the initiatives.