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## 5.0 IT ASSESSMENT PROJECT APPROACH

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### **Step 1: Project Startup**

*Project Startup will solidify UWM's IT Assessment needs to support the academic and administrative IT Assessment effort. This will include project scope, objectives and issues and will result in a detailed project plan.*

#### ***Objectives:***

- Develop consensus on project scope
- Review and agree on project processes
- Develop detailed project plan
- Launch project

#### ***Approach:***

- Interview project sponsors and other designated individuals
- Review with management to finalize agreement on scope
- Conduct one brainstorming session with project team

#### ***Deliverables:***

- Project plan with major milestones
- Project team assembled
- Project launch presentation

### **Step 2: Understand UWM's Strategies and Drivers**

*Before focusing on the IT Assessment's content, it's important to understand UWM's overall strategic drivers. These will provide the context for the assessment and help to drive changes in IT that directly support UWM's mission and goals.*

#### ***Objectives:***

- Understand the strategic drivers of the major UWM stakeholders

#### ***Approach:***

- Review the UWM web site for the campus Mission, Goals and previous planning efforts
- Review existing strategic documentation (Chancellor reports, Accreditation Reports, etc.)
- Conduct interviews with the UWM President and direct reporting VP's (up to 5 interviews)
- Identify and prioritize the major stakeholder groups
- Conduct a consensus workshop with key campus executives

#### ***Deliverables:***

- Documented UWM strategies and strategic drivers in a brief (3-5 page) landscape report

### Step 3: Conduct Assessment Surveys and Workshops

*In order to understand the needs of each of the major stakeholder groups as well as the resources assigned to IT across the university, surveys will be administered to determine the current state of IT capabilities at UWM.*

#### *Objectives:*

- Develop a broad based picture of the University of Wisconsin - Milwaukee's current academic and administrative IT capabilities, needs and resources
- Ensure adequate opportunity for "bottoms-up" insights and ideas

#### *Stakeholder Needs Approach:*

- Conduct a **Stakeholder Needs** survey discussion session (content, scope, process)  
*ASSUMPTION: This will involve one survey review session.*
- Utilizing BCS's Higher Education IT Requirements surveys, we would survey representative campus faculty (100%), staff (100%) and students (up to 10%) to assess their IT needs and critical issues.  
*ASSUMPTION: To minimize costs, the surveys will be created, printed, distributed, collected, and entered into a Microsoft Excel spreadsheet file by UWM personnel. Additionally, UWM will generate the first set of simple survey response charts (simple bar and pie charts). We have discussed the efforts involved with these surveys and the UWM departments involved have agreed to perform the work, with certain calendar constraints. The cost for these various UWM departments to perform the survey tasks are outside of the scope and price of this proposal and will be billed directly between these UWM departments and the campus.*
- Conduct stakeholder workshops (students, faculty and staff) to refine survey findings  
*Assumption: This will involve up to 7 workshops (2 Student / 2 Faculty / 2 Staff / 1 Research Community)*
- Conduct workshops with the project team to develop preliminary and final results.  
*Assumption: This will involve up to 3 workshops*

#### *IT Resources Approach:*

- Conduct an **IT Resources** survey discussion session (content, scope, process)  
*ASSUMPTION: This will involve one survey review session.*
- Utilizing a combination of BCS's IT Expenditures Survey and IT Support Resources Survey, we will survey every major UWM department to define the IT resources available and the cost of providing those resources. This includes: personnel, hardware, software and network costs.  
*ASSUMPTION: To minimize costs, the surveys will be created, printed, distributed, collected, and keyed into a Microsoft Excel by UWM personnel. We have not discussed this work with UWM, however it is our expectation that using student labor, this should not be a big deal. Unlike the stakeholder surveys, the quantity of data being entered is relatively small.*
- Conduct IT Provider workshops (central and departmental) to refine survey findings  
*Assumption: This will involve up to 3 workshops (1 Departmental / 1 I&MT / 1 combined)*

*Wrapup Approach*

- Conduct interviews with the UW System IT staff, including the UW System CIO.

*Assumption: This will involve one day of interviews*

- Conduct workshops with the project team to develop preliminary and final results.

*Assumption: This will involve up to 4 workshops*

*Deliverables:*

- Quantitative and qualitative assessment of the current state of IT across UWM, as well as some components of the future state stakeholder requirements.
- Quantitative and qualitative analysis of the IT resources at the UWM campus

#### **Step 4: Position UWM's current state with other institutions**

*Our consultants will provide a comparative positioning of UWM with other peer institutions.*

##### ***Objectives:***

- Understand the positioning of UWM's academic and administrative IT investments against the collective position of other similar institutions
- Recommend areas for improving UWM's positioning

##### ***Approach:***

- Review literature and past IT planning studies
- Interview key peer representatives to gain an understanding of their institution how they've leveraged technology to support their goals  
*Assumption: This will involve up to 3 'peer' institutions (UWM will select these 'peers')*
- Conduct workshop with the UWM project team to review the findings of this effort.

##### ***Deliverables:***

- An assessment of UWM's IT resources, compared to other institutions

## **Step 5: Develop Communications Plan**

*Key to the success of this project will be a campus-wide communications plan that will educate the stakeholders about UWM's Information Technology Assessment, describing its objectives, findings and recommendations.*

### ***Objectives:***

- Develop the action plan for communicating the IT assessment findings and recommendations to the campus stakeholders, emphasizing how it responds to their needs

### ***Approach:***

- Conduct a workshop with key campus communications staff to design and develop a plan to effectively communicate the IT assessment, internally and externally
  - The workshop will identify the key stakeholders groups, their preferred communications media and the probable messages that should be sent.
  - The workshop will also identify the two-way communications vehicles that should be created to support open communications during the project (voicemail box, e-mail box, web site, etc.)

*Assumption: UWM will be responsible for generating the various communications messages that will be needed. BCS consultants can help generate the messages if desired for an additional fee.*

### ***Deliverables:***

A plan for delivering project communications throughout the project. It will include:

- Action Plan:
  - Key messages to be delivered
  - Target audiences
- Recommended communication vehicles
- Assigned ownership