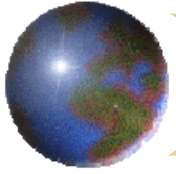


# *IT Strategic Planning and Governance*

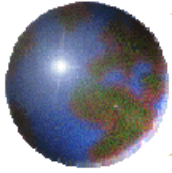
*What it is and Why it matters*

---



# *A Story....*





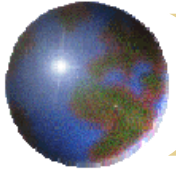
# Overview

## ● Strategic Plan

- ▣ Long term plan defining IT goals, resources, and measures

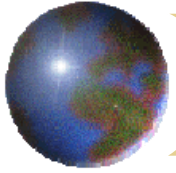
## ● IT Governance

- ▣ Ensuring that IT projects and resources are aligned with overall organizational goals and strategies
-



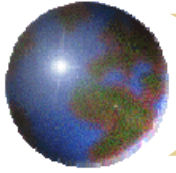
# Governance





## *Governance*

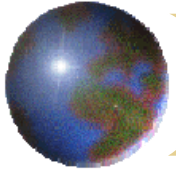
- ✚ IT needs to understand what is expected and what the priorities are
  - ✚ The government needs to understand what is possible
  - ✚ Governance provides a way for both sides to communicate
-



# ***Governance***

## **Structure**

- **Where does IT fit in the organization chart?**
  - **CIO, CTO, IT Director, IT Manager**
  - **Steering Committee**
    - **Cross functional**
    - **Organizational leaders**
    - **Authority and responsibility**
-



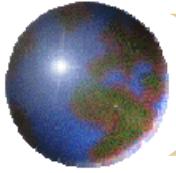
# ***Governance***

## **Steering Committee Function**

- ❑ **Evaluate alternatives and respond to operational changes**
- ❑ **Allocate resources**
- ❑ **Resolve issues**
- ❑ **Sign off on strategic plan**
- ❑ **Don't manage the IT function**

***Ensure alignment – highest and best use of available staff and funding***

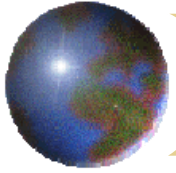
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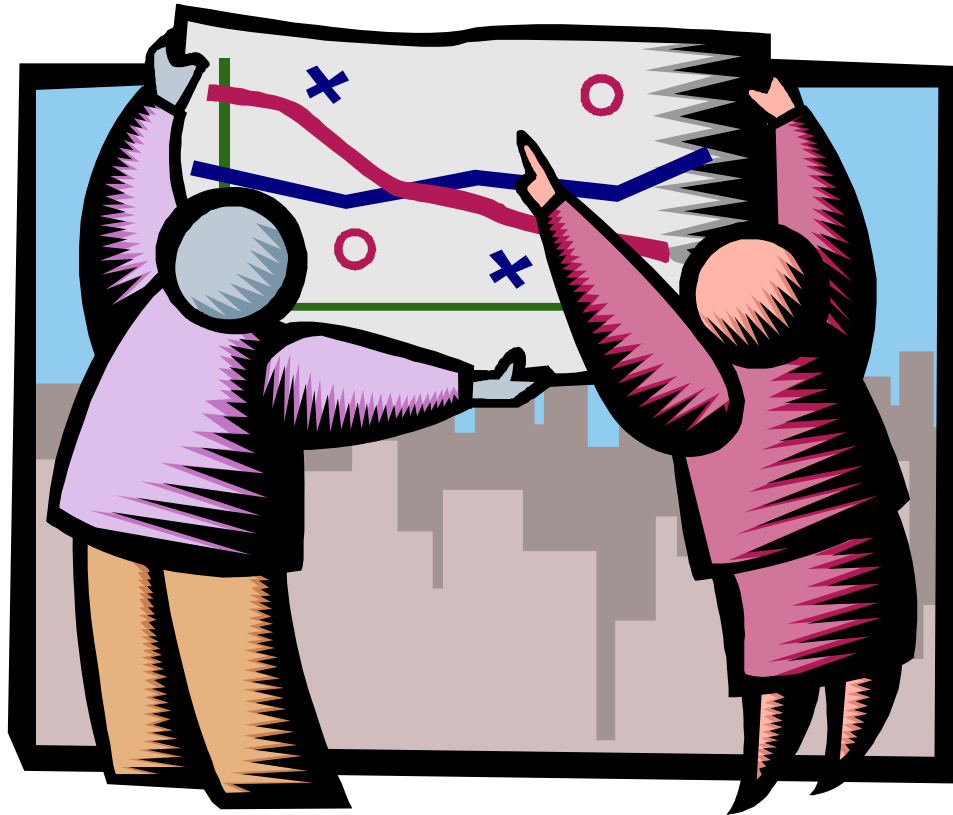
# **Governance**

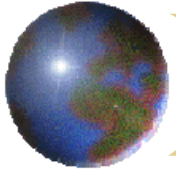
## **Steering Committee - logistics and operations**

- ❑ **Typically chaired by CIO or IT Director**
  - ❑ **Meet monthly**
  - ❑ **Update strategic plan annually**
  - ❑ **Results communicated to IT and key stakeholders**
-



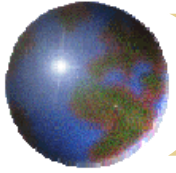
# *IT Strategic Planning*





## ***The IT Strategic Plan***

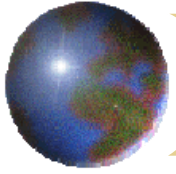
- **Three year plan is most typical**
  - **Outlines mission, current state, desired future state, and roadmap for getting there**
  - **Developed by IT, owned by steering committee**
-



# ***The IT Strategic Plan***

## **Mission:**

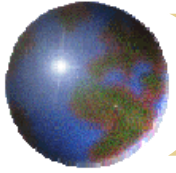
- ❑ Vision statement**
  - ❑ Values and principles**
  - ❑ Understanding of the organization's goals**
-



# ***The IT Strategic Plan***

## **Current State:**

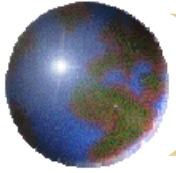
- ❑ Staff levels**
  - ❑ Budget and where spent**
  - ❑ Technology**
  - ❑ Current projects and commitments**
-



# ***The IT Strategic Plan***

## **Future State:**

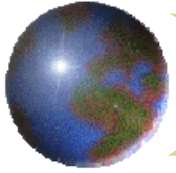
- ❑ **Industry trends and recommended practices**
  - ❑ **Services and roles**
  - ❑ **Resources – staff/budget allocations**
  - ❑ **Technology**
-



# ***The IT Strategic Plan***

## **Roadmap for getting there:**

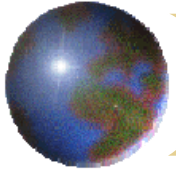
- **Governance, prioritization**
  - **Staff – hiring, training**
  - **Reallocating budget**
  - **Technology**
  - ***Specific goals and measures***
-



# ***The IT Strategic Plan***

## **Examples of goals and measures:**

- ❑ Help desk response times**
  - ❑ Network and telecomm uptime**
  - ❑ Budget allocations**
  - ❑ Customer satisfaction survey results**
  - ❑ Training and certification measures**
  - ❑ Disaster recovery plan test**
-

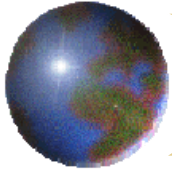


# *The IT Strategic Plan*

**See a sample plan at:**

**[www.gfoaconsulting.org](http://www.gfoaconsulting.org)**

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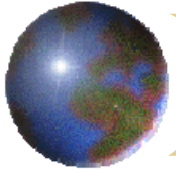
# ***Other Considerations***

## ● Size

- Small governments may not need or desire as much formality and structure
- Different use of third party service providers
- IT may not be a separate function in smaller governments

## ● Purpose/Structure

- Alignment in special districts is sometimes even tighter
  - Highly decentralized IT environments are much more difficult to plan well
-



## **Benefits**

- **Proper Allocation of Scarce Resources**
  - **Fewer Surprises = Cost Savings**
  - **Plan vs. React**
  - **Transparency and Accountability through Shared Decision Making**
  - **Leverage Technology for Maximum Benefit**
-

# Cut Costs through IT Planning

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# Topics for Discussion

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- **Planning for business system software implementations**
  - Business Process Review/ Requirements Analysis
  - Return on Investment Analysis
  - Common Areas of Cost Overruns
  - Common Trends Today
- **Planning for deployment**
  - Cost Components
  - Common Trends Today



# Business Process Review/ Requirements Analysis

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- What is it?
- Preparation is critical
  - Ask for questions in advance
  - Schedule internal meetings
  - Review/Document your own workflows
- Don't shortchange this phase
- Don't install or configure anything until design is complete



# Return on Investment Analysis

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- Identify critical success factors BEFORE the project starts.
- Look for measurable areas of potential improvement.
- It's not just about cutting positions.
  - Be creative
  - Forget "just because it's always been that way"



# Common Areas of Cost Overruns

- Lack of Project Management
  - Internal AND Vendor
- Data Conversion
  - You must take ownership
- Project Delays



# Common Trends Today

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- Paperless Environment
- Workflow Automation
- Collaboration Portals
- Dashboards
- Self-Service
- Transparency



# Keys to Success

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- Carefully define expected outcomes
- Don't do it "because it's there"
- Remember your audience
  - Self-service is expected
  - But not available to all
- Transparency
  - Automate
  - Validate – make it relevant



# Planning for Deployment

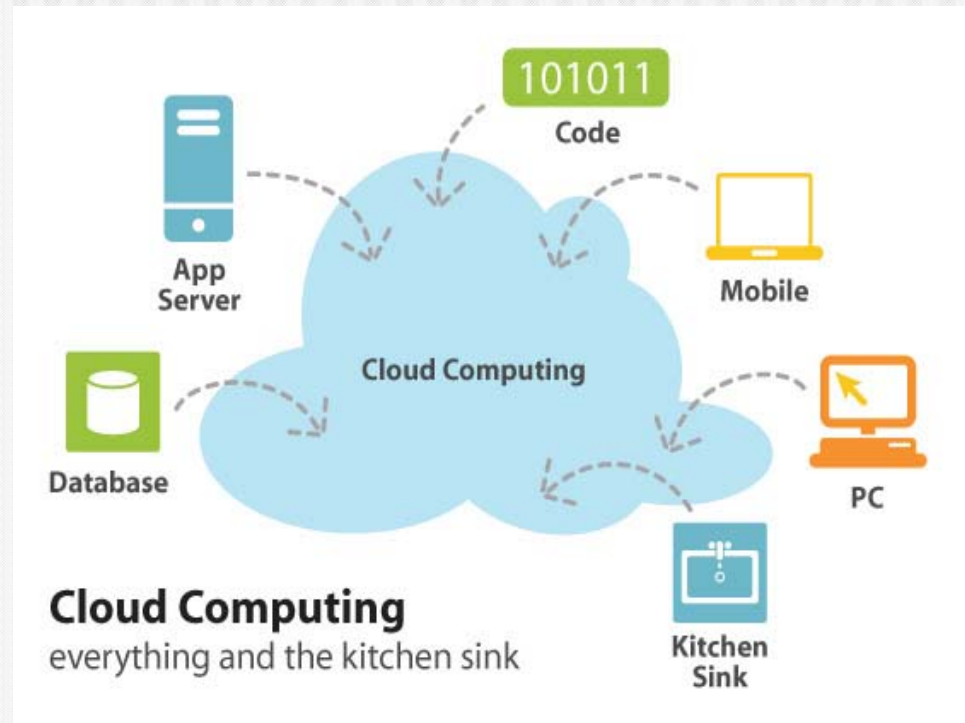
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- Cost Components
  - Software
  - Annual Software Maintenance
  - Support
  - Implementation Services
    - Design
    - Installation and Configuration
    - Data Conversion
    - Integration and Testing
    - Training



# Common Trends to Explore

- Hosting
- Software-as-a-Service
- Virtualization
- Mobility





Questions?