



Strategic IT

CAJPA SPRING WORKSHOP
TECH SAVVY, HR WISE
& FISCALLY READY





Strategic IT

How to Use IT Within the Strategic Plan of the Pool

Carl Sandstrom, California JPIA

Dave Glende, CrossMark Risk Solutions

Introduction

- Purpose
 - How to use IT as a strategic asset
- Topics
 - Value and importance of Strategic IT Planning
 - Planning and Decision Making
 - Stakeholder Communication

VALUE AND IMPORTANCE OF STRATEGIC IT PLANNING

Common IT Problems

- Solve wrong issue
 - Symptoms and not underlying Root Causes
 - “How” and not on the desired Outcomes
- Solution done in a vacuum
 - Inter-departmental impacts
 - Impacts on other processes
- Solution done without sufficient future view in mind
- No bigger plan to drive architecture and decision making
 - Driven by latest fad, pet projects, strongest opinions/egos

Solution: Strategic Planning

- Answers these two questions:
 1. Are we doing the right things?
 2. Are we doing things in the right way?

Definition

“It is a disciplined effort that produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it, with a focus on the future.”

Balanced Scorecard Institute

Impact of Strategic Planning

- Establishes agreement around intended outcomes/results
- Aligns employees and other stakeholders through common objectives
- Sets priorities
- Focuses energy and resources
- Strengthens operations

Strategic Plan

- Imagines the future and then works backward
 - Focuses on the desired outcomes
 - Steps to achieve those outcomes
- Outcomes (Goals)
 - Justification/Expected Impact
 - Can be quantified/measured
 - Testable to prove that they have been achieved
- Steps (Objectives)
 - Action-oriented
 - Due Dates, Owners, Deliverables, Costs

Strategic IT Plan

- **Inputs**
 - Pool Mission and Vision
 - Pool Strategic Plan
 - Member/Partner Needs and Expectations
 - Technology Trends
- **Outputs**
 - 3-yr Plan
 - Goals and Objectives
 - Budget
- **Related**
 - IT Architecture Plan
 - Project Plan
 - Staffing
 - Vendors/Partners
- **Oversight**
 - Contents
 - Updated annually
 - Implementation
 - Reviewed 2x per year

Pool/IT Strategic Alignment

- Pool Strategy drives IT Strategy
- IT Objectives for each Goal/Objective
 - What existing IT systems need to change
 - What new IT technology and/or system can be used to further/achieve this goal
 - What Architectural changes/enhancements need to be made

PLANNING AND DECISION MAKING

Ideas Start From...

- The want to stay competitive, be more productive
- Societal adaptation of the Utility of IT
- The need for greater workplace autonomy and flexibility
- New attitudes, expectations, and ways of working
- The want to empower, engage, enable

Whose Idea is it?

- Does it matter? No

- Board
- Staff
- Members
- Vendors
- Competitors



- Professionalism matters

Keeping Track of Ideas

- Where are the ideas generated by your stakeholders being kept track of?
- Is this centralized or decentralized for your pool?
- Who strategically asks: Is now the time for this idea/solution? Does this new solution finally allow us to implement old ideas?
- What is your plan to assess, implement, postpone or permanently reject, any idea/solution?

Tech-enabled Solutions

- We don't have to live with this problem...do we?
- Not every problem warrants a technological solution
 - What is the cost to the stakeholders ?

Efficiency	Effectiveness
Reputation risk	Goodwill building
Cost in Money	Cost in Time
Cost in Maintenance	Sleeping Well

Does this work with our IT
Infrastructure?

Who do you ask?



IT Architecture Plan

- Documents the foundation of IT usage
 - Network/Deployment
 - Systems/Services
 - Data/Information
 - Processes
- Proposed Projects must fit within the IT Plan
 - Confirmed as is
 - IT Plan updated to accommodate new capabilities

Determining the Solution

- Type of Solution
 - Standard/Customized Application/Service
 - Custom built Application/Service
- Implementation
 - Vendor, In-house
- Requirements Document
- RFP/Non-RFP Process
- Vetting Proposals
- Budgeting
- Non-compliance with IT Plan

Moving Forward

- Determine how to accommodate in the IT Plan
- Update the IT Plan
- Integrate into the Project requirements
- Budget realistically
 - Be wary of scope creep

Questions to Ask


- Does a Proposed Project:
 - Add/Update new core Systems, Data, Processes?
 - Add/modify Process steps?
 - Get triggered by Processes or Data changes?
 - Have a reliance on core Systems, Data, or Processes?
 - Increase/Reduce admin time?
 - Focus risk of failure on one person?


STAKEHOLDER COMMUNICATION

Circular in Nature and by Design

- Stakeholders deserve updates
 - Nature and frequency varies
- Risk Management 101
 - Identify the problem
 - Assess solutions
 - Decide on solution
 - Implement solution
 - Monitor and adjust as needed

Circular in Nature and by Design

- The Life of a Technology Idea at The Authority
 - Source idea
 - How will this make the Authority better?
 - Discuss with relevant stakeholders
 - Do other pools use this solution?
 - Get buy-in from CEO/AEO

Gather/Share requirements
 - Does it work with our IT Infrastructure?
 - Discuss with IT Architect

Gather/Share requirements

Circular in Nature and by Design

- The Life of a Technology Idea at The Authority

- Research vendors

- AGRiP, CAJPA references
- Market leaders
- Gartner, other reviewers

- Initial interviews

- Verbally report to

- Stakeholders
- AEO

Who/what
can satisfy
requirements

Who/what
can satisfy
requirements



Proceed or not

Circular in Nature and by Design

- The Life of a Technology Idea at The Authority

- Let's Do IT!

- Refine scope
 - Refine requirements
 - Decide purchase path
 - Estimate time to implement

Gather/manage expectations of stakeholders

- Inform general staff

Prep for Organizational Change

- Decide on Solution provider

- Update AEO and Stakeholders



Circular in Nature and by Design

- The Life of a Technology Idea at The Authority
 - Contract review and signing
 - Statement of Work
 - Includes project timeline
 - Includes project resources
 - Authority's resources
 - Manage the calendar
 - Ask stakeholders for input
 - Will coordination of other tech be required?
 - Include buffers

Share with stakeholders to allow application of necessary resources and to initiate change within staff processes and procedures

Circular in Nature and by Design

- The Life of a Technology Idea at The Authority
 - Manage Expectations/Organizational Change
 - Do update as progress is made or setbacks encountered
 - Do update if/when changes are forced upon the project
 - Do update if the implementation date gets moved. Tell them “Why.”
 - Do check that internal stakeholders are doing their own work to manage expectations and change within their team
 - Do check on messaging to external stakeholders

Circular in Nature and by Design

- Stakeholders deserve updates
 - Nature and frequency varies
 - Board – annual report
 - Senior Staff – weekly, monthly updates
 - Staff directly involved in project – weekly, daily, up-to-the minute
 - All other staff – monthly, quarterly updates
 - Members – newsletter, social media, email, conference topic

CONCLUSION

Using IT as a Strategic Asset

- Plan Strategically
 - Are you doing the right things?
 - Are you doing things in the right way?
- Align IT with the Pool's Strategic Plan
- Have repeatable Processes and Documentation
- Keep all informed and involved
 - Early and often

THANK YOU