

## Strategic Plan for Enterprise Administrative Information Systems

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### Executive Summary

#### The Strategic Imperatives of a Public University

The mission of the University of Michigan, as stated by President Coleman, is to serve the people of Michigan and the world through preeminence in creating, communicating, preserving and applying knowledge, art, and academic values, and in developing leaders and citizens who will challenge the present and enrich the future.

In order to accomplish its mission, the University must address specific strategic imperatives in order to be successful. Strategic imperatives are the core activities an organization must successfully accomplish in order to retain or improve its standing among peers in its industry. As a public university and research institution, the University of Michigan engages in research, teaching and public service. Accordingly, the strategic imperatives of the University are to:

- Attract and retain exceptional faculty
- Attract and retain exceptional students
- Attract and retain exceptional staff
- Increase revenues from non-state sources, such as research and fund raising
- Manage and contain operational costs.

#### The Strategic Objectives of MAIS

The mission of Michigan Administrative Information Services (MAIS) is to partner with the University community by providing leadership in enterprise-wide administrative information services and systems to effectively and efficiently support the University's operations and strategic imperatives. We believe information technology (IT) can and should play a strategic role in helping facilitate the achievement of the University's mission. The strategic objectives of MAIS must align with and support the strategic imperatives of the University.

The University of Michigan is a highly decentralized institution, so the specific strategies for meeting the imperatives and mission of the University are developed and carried out at many levels. In order to identify and understand these strategic priorities, from August through October 2005 MAIS conducted interviews with executive officers, deans, and other leaders to identify the challenges they face and their plans for the future. The information collected from these interviews was used to develop the strategic priorities of MAIS (see appendix C for a complete listing of the themes identified). The priorities of MAIS will be to leverage enterprise information technology systems to:

1. **Minimize administrative burdens placed on our faculty.** Improving the work life of faculty is crucial to maintaining and increasing the excellence of the institution. To enable collaboration, faculty need to easily access and share information regarding research and teaching activities across the University. Moreover, units want to better leverage faculty and staff resources across the University and to actively enable and support faculty development and performance. Information technology will play a key role in providing timely information to faculty in order to reduce administrative burdens while simultaneously providing avenues for sharing information to improve collaboration, interaction with students, delivery of instruction, and resource utilization.

2. **Enhance academic units' ability to connect with individual students.** Academic units strive to cultivate a rewarding and productive relationship with students throughout the lifecycle of their engagement with the University. Whether it be innovative student recruitment programs, improved enrollment management and course demand planning, or staying connected to alumni, information technology initiatives will play a critical role in helping students feel more connected to the University.
3. **Maintain and increase the excellence of our staff.** The retirement of a significant portion of the workforce is a future challenge that requires the transfer of institutional knowledge to a new group of managers. The University needs to meet the demands for training the existing and new workforce via enhanced staff training and education. There is a need to develop better capabilities for tracking and managing staff performance. Finally, there is a need to reduce the administrative burden on staff. Easier access to policy, procedure and regulatory information is needed.
4. **Streamline and improve research administration.** Units will continue to increase their pursuit of both private and public research funding opportunities. To support research pursuits, the University is strategically developing research facilities in emerging scientific fields. There is significant concern about the administrative burden related to grant submission and management, and the lack of data about the University's total research effort. There is also concern about protecting informational assets and complying with increased regulations. Improved information technology systems will play an important role in overcoming these concerns.
5. **Streamline and improve the fundraising process.** Many units plan to pursue increased private support to maintain the quality of their programs and take advantage of new opportunities in an era of decreasing state support. There is a desire to increase both large donations and annual giving through improved identification, interaction, and tracking of potential donors through improved business processes and better access to and use of alumni and donor information. The efficiency of fundraising events could be improved through better information management tools and processes. There is a high level of dissatisfaction with the current development information systems and processes in meeting the above needs.
6. **Maintain excellence while optimizing the size of our academic programs and use of facilities.** Most units cited the need for more space to support increased research and student enrollment. Some units are adding new undergraduate programs, some are increasing the enrollment in existing programs, while others plan to add or expand executive education programs. Units will need to upgrade or expand physical facilities and improve the management of physical space and events. Most deans do not have good information about how space is utilized or the long term cost of adding and maintaining more space. Improved information systems are needed to provide this information.
7. **Enhance administrative processes through efficiency gains and resource sharing.** There is universal desire to create more efficient and cost effective administrative processes. Many deans from small units urged the centralization of some administrative functions. Some interviewees identified the need to address the challenge of managing a diverse technology infrastructure environment. The University needs to continue to utilize technology to meet more demanding service delivery performance expectations while reducing administrative costs.
8. **Protect informational assets and privacy.** Student, alumni, donor, patient, employee and research information that is personal or proprietary must be protected. The University must employ the latest proven security techniques and technologies to ensure these data are protected. Moreover the University must engage in developing and testing new security approaches to maintain the reputation of being a leader in this field. MAIS and its affiliated Information Technology Security Services will continue to work with IT organizations within and outside of the University to ensure its information protection needs are met.

### **Key Decisions**

To support the University's strategic imperatives MAIS conducted research and review of many technologies and practices to identify the IT strategies which will best support the University. The following decisions will guide MAIS in the coming years:

- MAIS plans to upgrade to the Oracle Fusion enterprise applications. We believe this move will present the easiest transition for the University community while ensuring business needs are met. We will also continue to explore and monitor other solutions, including community sourced software, to ensure our strategy best satisfies University business needs.
- Our future application environment will be based on web services, a technology that allows for the improved integration of disparate systems, in order to enhance the ability to integrate unit and enterprise data. The core infrastructure of MAIS systems will include workflow, messaging, identity management, and other core services that will need to span all systems.
- MAIS will increase and expand direct services to the schools, colleges, and Health System to support their needs.
- MAIS will expand and formalize its governance structure to ensure the activities it carries out remain aligned with the overall strategic priorities of the University. We will work with the MAIS Advisory Committee to prioritize MAIS initiatives from a cross-University perspective. We will operate under the assumption MAIS will see minimal budget increases in the foreseeable future, and accordingly, we seek guidance from the Advisory Committee and other University leadership to make the strategic decisions regarding how MAIS resources should be allocated.

### **Key Initiatives**

A number of initiatives have been identified that will directly support the strategic priorities of MAIS. These are:

- Business Intelligence – we expect the strategic use of information to be included in almost all future applications we implement. There are a number of projects that will focus primarily on the strategic use of information.
- Research – University leadership has approved a project to implement a pre-award management system for sponsored research. The system will include direct interfaces into grants.gov – the Federal government system for funding requests.
- Development – we anticipate the replacement of the Development and Alumni Constituency (DAC) system used for prospect and gift management. The current mainframe system was implemented in 1991 and has very limited functionality compared to today's development systems.
- Space Management – Economic pressures are forcing the University to re-examine how effectively it uses its physical assets. Significant enhancements to the existing enterprise space, and classroom scheduling systems will likely need to be implemented.

### **Conclusion**

The MAIS Strategic Plan will provide a roadmap to support the University's most important priorities. There are many challenges an IT organization faces with developing a strategic plan as the University is a complex and dynamic organization with changing needs. The priority setting process has to be transparent and fluid, therefore the MAIS strategic plan must be viewed as a living document.

The plan will be updated annually to ensure it supports new challenges and priorities as they emerge and that all of MAIS resources (human, technical, and financial) are directed towards the University's most important needs.