Overview and Purpose

The University of Florida Administration is committed to an open and collaborative approach to Information Technology (IT) planning. A one-day planning retreat was held in order to begin this process. Individuals representing all of the colleges, major operational units and organizations throughout the UF community participated in and contributed to this retreat.

Participants brought an overall knowledge and understanding of the information and data needs of their faculty, staff, students, and partners (i.e., external and affiliated organizations including academic and research communities, clinical enterprise, IFAS extension service, funding and regulatory agencies, state contracts, industry, and other outside entities). Participants were knowledgeable regarding their culture, academic structures, business processes and other functional operations and effectively represented their organizations.

The purpose of the retreat was to begin the work of identifying the effective support needs for the missions and business processes of our colleges and units relating to information technology support and to begin developing a process for formulating responsive strategic IT goals for the university. This initial planning retreat also focused on IT governance and services.

Retreat Participants provided preliminary input on the current state of Information Services and Technology (IS&T) at UF, crafted a number of strategic statements that reflected their thoughts for the future of IS&T and then discussed various ideas and suggested recommendations. No decisions were made and the group did not consider approaches or how best to address the recommendations. This report of their work will be forwarded to UF leadership including Dr. Janie Fouke, Provost and Senior Vice President for Academic Affairs; Dr. Douglas Barrett, Senior Vice President for Health Affairs; Dr. Jimmy Cheek, Senior Vice President for Agriculture and Natural Resources; and Dr. Marc Hoit, Interim CIO, for their review and consideration in framing future direction and establishing next steps in the planning process.
Recommendations

The following Recommendations derive from small group and combined large group work by retreat participants, including suggested ‘Strategic Statements’ (see Appendix A) and preliminary ‘Current State Measurement’ (see Appendix B). Participants engaged in several dialogue and brain-storming exercises culminating in the identification of common themes/planning areas that were used as a framework for formulating recommendations. These recommendations are suggestions, are not prioritized, and are not intended to be all encompassing, but are felt to be important to the success of Information Services and Technology (IS&T) at UF.

1. **Recommendation: University of Florida (UF) leadership continue their commitment to making Information Services and Technology (IS&T) a priority.**
   Rationale: IS&T is a valued and integral function and essential to the work of meeting university goals, serving all missions, and competing in the academic, research and clinical communities.
   Further highlights and synopsis statements of participant work:
   - Commit to IS&T through shared governance, planning and sustained funding.
   - Involve IS&T in university level, and other organizational planning and decision-making, including university-wide planning and budgeting process.
   - Address common IS&T needs collaboratively at the university level.
   - Strive for consensus with respect to the vision and strategic directions for IS&T at UF. Develop IS&T strategies in consideration of overall university strategies and those of local colleges and units.
   - Embrace proactive rather than reactive approach to managing IS&T.
   - Ensure accountability and responsibility at all levels of the organization without stifling innovation, adaptability, and flexibility.

2. **Recommendation: All IS&T organizations commit to user focused and user driven approaches to planning and providing services and resources.**
   Rationale: IS&T exists to support the work of UF faculty, staff, students and partners.
   Further highlights and synopsis statements of participant work:
   - Develop, maintain and communicate a clear understanding of all users and partners, and their information and IS&T needs.
   - Ensure ongoing availability of well defined and measured user requirements.
   - Be responsive to different categories and missions of users and their needs.
   - Consider both internal and external users, stakeholder groups, and partners (i.e., external and affiliated organizations including academic and research communities, clinical enterprise, IFAS extension service, funding and regulatory agencies, state contracts, industry, and other outside entities).
   - Respond to the special needs and resulting level of service of local units and shared user groups such as those involved in research, clinical care, and IFAS extension service. The unique needs of researchers, and other user groups include, among others, computational capacity, storage, space, power, bandwidth, regulatory
requirements (i.e., HIPAA, FDA), faculty and staff training. Need to ensure adequate flexibility for very high-end data collection, management and transfer.

- Ensure ability to serve and interact with diverse, distributed and external entities.
- Provide the ability to access and move any and all data, providing interconnectivity for everyone, to and from everywhere.
- Provide mechanisms to respond to and provide support for unanticipated needs.
- Promote and support IS&T literacy of all users and user groups.

3. **Recommendation: Investigate, develop and perform an IT Assessment; implement and support as an ongoing function of IS&T.**

Rationale: The university and IS&T needs accurate, complete and timely information and data regarding all aspects of IS&T to support informed planning, decision-making, customer relations, and the efficient allocation and utilization of resources. The depth of knowledge about IS&T needs and current capacity is not well documented or understood. Further highlights and synopsis statements of participant work:

- Assess needs of all internal and external users and partners, at all locations including remote sites. Use customer-focused approach.
- Assess common and unique user and stakeholder groups, their expectations and needs.
- Determine current state of IS&T including information regarding available services, service providers, resources, skills, expertise, and how to access across colleges and units. Include information regarding current funding and governance models. Perform analysis from the “ground up”.
- Ensure problems and needs are clearly understood, and that associated issues, business processes, areas of assigned responsibility and accountability are determined. Need to be clear about the problems being addressed, their causes and that the appropriate entities are involved in developing solutions.
- Gather comparative data across UF units/service providers, investigate similar experiences/approaches of other universities, and benchmark IS&T at UF compared to AAU (Top 10).
- Acquire information regarding IS&T costs, expenditures, and allocation of resources.
- Address confusion and complexities caused by organizational boundaries.
- Maintain ongoing knowledge and awareness of the impact of emerging technologies.
- Establish and support mechanisms to share all information with all who may benefit.

4. **Recommendation: Promote and foster a culture of commitment, collaboration, openness and transparency within and between IS&T organizations and the university community.**

Rationale: Collaboration and transparency help to remove barriers and overcome the “silod” nature of IS&T at UF. They also serve to foster inter-unit cooperation and the ability to work together.

Further highlights and synopsis statements of participant work:

- Enhance ability to collaborate and coordinate among all parts of the organization.
- Exploit and leverage the diversity of the organization.
- Foster openness and transparency in decision-making, direction, and information sharing.
- Support partnering across IS&T organizations, colleges and units, shared user groups (researchers, clinicians, others), common stakeholder groups, IT developers and specialty areas, and external community.

- Reward entrepreneurial efforts and innovation.

- Support a collaborative learning environment.

5. **Recommendation: Investigate, develop, implement and support an IS&T Governance Model including required organizational structures and processes.**

   **Rationale:** The explosion in the amount of information, and the increasing importance, complexity, expense, and ubiquitous nature of IT often makes IS&T the least understood and often ineffectively utilized asset in universities. IT governance involves specifying the decision rights and accountability framework to encourage desirable behavior in the use of IT. Effective IS&T governance enables the university to maximize the value it receives from IT. It also leverages innovation and the unique expertise of the university community in IT development and usage while ensuring support for the university’s missions and goals.

   Further highlights and synopsis statements of participant work:
   - Investigate potential relationship to current shared governance model.
   - Integrate IS&T governance with other existing governance structures. Support local unit level decisions in governance.
   - Involve all IS&T organizations (including local) in strategic planning and governance.
   - Expand opportunities for faculty, staff, and students to participate in and provide input to IS&T governance including advisory groups, in support of user-focused services and fostering buy-in for shared decisions.
   - Ensure effective and timely dissemination of and access to information involving the work of current and future IS&T governance structures including advisory groups.

   **IT Governance Decision Domains include:**
   - IT Principles Decisions
   - IT Architecture Decisions
   - IT Infrastructure Decisions
   - Business (and missions) Application Needs
   - IT Investment and Prioritizations Decisions

6. **Recommendation: Investigate, develop, implement, evaluate and support a responsive, effective and transparent IS&T Services Model.**

   **Rationale:** Among the purposes of IS&T is to support the university’s missions and goals, and be responsive to the IS&T needs of faculty, staff, students and their partners. UF includes an extremely distributed and complex organization and environment which is reflected in our current IS&T. UF and IS&T needs the benefit of a rational, responsive, scaleable and adaptable Services Model.

   Further highlights and synopsis statements of participant work:
   - Commit to making a priority providing access to both information and services by everyone, to and from everywhere.
   - Develop a user focused and driven services model that defines scope of services including R&D and infrastructure support.
- Develop approaches to planning and decision making regarding the addition, modification, or elimination of individual IS&T services.
- Determine the best tactical approaches to providing and accessing commonly needed IS&T infrastructure services and resources by everyone who needs them.
- Maintain reliable, effective and cost efficient IS&T infrastructure services based on agreed upon core operating principles, common utility, level of support, metrics and minimal standards.
- Ensure equitable value, quality, connectivity and level of service, funding, and resource allocation for common infrastructure services.
- Develop mechanisms for users and units to go beyond the common infrastructure level of services and access.
- Develop a services model for both common infrastructure and distributed (local) IS&T services that:
  - Supports and enables improvements to the university’s business models and processes.
  - Achieves an acceptable balance between flexibility and efficiency provided through demonstrated economies of scale.
  - Encourages flexibility in adopting new technology.
  - Allows for a distributed framework for common infrastructure services.
  - Addresses the current (and sometimes inequitable) variability in level of services and support (ex: desktop support enterprise-wide) across units.
  - Considers outsourcing as an option.
  - Includes mechanisms and processes for prioritizing needs, services, development efforts, and allocation of funding and resources.
  - Addresses the need for well defined and developed IS&T purpose, functions, roles, organizational structures, processes and competencies.
  - Embraces the values of effectiveness, responsiveness and adaptability.
- Selected IS&T functionality and user requirements include:
  - Accessibility including offsite, to and from remote locations.
  - Access to current technologies on campus from anywhere.
  - Ubiquitous wireless access.
  - Ability to move information to and from anywhere, and in a secure manner.
  - Access to all kinds of data, including enterprise data that is maintained and updated by authoritative sources (one way).
- See Current State Measurement (Appendix B) for input regarding specific services.

7. **Recommendation:** Commit to building and supporting a mature, positive, and productive learning organization for IS&T professionals and staff at UF.

Rationale: Support for organizational development and effectiveness enables IS&T to provide quality services and support for creating, acquiring, processing, storing, transmitting, utilizing and securing information. Ensuring continuity and availability of services and staff requires well-developed and supported organizational structures, functions, roles, processes, knowledge, systems, tools and training.

Further highlights and synopsis statements of participant work:
- Build maturity and competency of IS&T teams by providing organizational development support including:
- Training and cross training.
- Adoption of standards and certification recommendations with respect to needed skill sets for various roles and areas of expertise.
- Ongoing support and opportunities to acquire and maintain knowledge regarding emerging technologies, trends and experiences of other universities and industry.
- Commit to funding and support for IS&T expertise, research and development work including partnering opportunities, and resources to execute projects.
  - Provide and maintain fair and competitive wages for IS&T professionals and staff.

8. **Recommendation: Investigate, develop and implement responsive, effective, feasible, and justifiable IS&T policies, standards, management models, and processes.**

Rationale: IS&T work can be approached in many different ways. Utilizing recognized models, standards and processes helps to ensure the efficient use of time and resources when developing and providing IS&T. Also, these approaches serve to ensure the availability, reliability, security and quality of information and IS&T.

Further highlights and synopsis statements of participant work:
- Adopting standards is challenging due to the diverse needs of users, distributed and varied IS&T environments, impact of external drivers, need for effective tools and a commitment to upgrades.
- Need flexibility in approaches that allow local groups to adhere to or move above standards.
- Permit development process to be nimble in the beginning, trying different approaches to determine what standards work best.
- Promote and support collaborative and participatory IS&T planning and development structures and processes.
- Adopt, promote, and support the following essential IS&T management models including training, processes and tools:
  - Change Management
  - Communications Management
  - Quality Management and Evaluation
  - Project Management

9. **Recommendation: Commit to the provision of adequate funding and expertise to support IS&T, and to the adoption of rational funding and costing models.**

Rationale: Effective and responsive IS&T requires both adequate resources and expertise. In order to meet these requirements, university leadership needs to be able to make informed decisions regarding funding and allocation of resources for IS&T, while supporting the missions and goals of UF, and balancing priorities. IT is expensive and making sound and rational funding decisions requires effective business models and processes. All of the recommendations in this report provide support for this decision making process.

Further highlights and synopsis statements of participant work:
- Consider relationships of funding models and business models when addressing common infrastructure versus local services and resources.
- Current funding approaches for IS&T raise several complex issues including:
  - Multiple sources of funding including grants and industry support.
  - Decision making regarding allocation of resources are made largely at the local college and department level.
  - Costing and charge back models vary widely, when used.
  - Need sustainable funding models and mechanisms to provide ongoing support for IS&T.
- Develop process for prioritization of funding / resources and ensure adequate and sustained funding and expertise/staff are in the right places to achieve desired goals.
- Address funding for local units. Increase funding if needed.
- Investigate impact and benefits of linking funding models to services.
- Develop models for measuring ROI.
- Develop flexible approaches to funding and resource allocation that consider:
  - Dynamics of our organization and environments.
  - Existing and historical approaches at UF.
  - Mixed models and governance models.
  - Impact of change on model.
- Ensure equity in providing funding for minimum/standard level of common infrastructure services and resources for all colleges and units.

10. Recommendation: Develop and support effective, open, transparent, and comprehensive communications involving all aspects of IS&T.
Rationale: UF needs pervasive, consistent and reliable resources and mechanisms for accessing, acquiring, maintaining and communicating information about IS&T, university organizational structures, all users and their needs. Effective communications together with reliable and complete information supports effective planning, management and use of IS&T.

Further highlights and synopsis statements of participant work:
- Ensure reliable access to information about IS&T services to and from anywhere by all faculty, staff, students, and partners.
- Support and foster communications mechanisms that enable entire university community to participate in IS&T planning and governance.
- Increase and improve communications and coordination between university leadership, IS&T, colleges/units/organizations, and all users.
- Strive to overcome “siloed” approach to providing services and communications.
- Address diverse, distributed and remote nature of the organization in developing communications strategies and processes. Consider:
  - Range and relationships of users and their information needs. Including internal and external users, individual and organizational users, partnerships both within the university and with external communities.
  - Commonly shared and unique needs of users groups and stakeholder groups.
  - Multiple and remote locations of users, partners, and IS&T providers.
- Support and foster partnering opportunities for IS&T research and development.
- Address customer (user) support needs including
  - Educate and inform users about available IS&T services, resources (skills and models), and how to access across colleges and units.
• Develop ongoing and reliable mechanisms to acquire customer (user) feedback.
• Educate users as to what IS&TT is, does and costs.
• Make information regarding needs of all users widely available.
Appendix A: Strategic Statements

Retreat participants worked in small groups to formulate strategic statements that reflect their thoughts for the future of IS&T at UF and was not intended to generate a complete listing. This exercise followed and was informed by the Current State Measurement (see Appendix B) exercise and participants worked at different tables to expand opportunities to interact with a range of individuals. The listings below are a transcription of the individual small group work by table.

Table 1
- Benchmark UF-IT Services compared to AAU (Top 10)
- Gather comparative data across units within UF
- Develop best practices to drive improvements
- Establish a data resource center to share this info

Table 2
- IT is mission critical to the University; NOT an option
- Clear vision of IT’s role in the University’s Mission
- Forward view instead of reacting
- Staff support to meet IT needs and vision | mission
- Ensure adequate commitment | competitive funding + training

Table 3
- Support Unit Level decisions in governance
- Development of climate of communication & collaboration between IT units
- Efficient & cost effective
  - Infrastructure
  - Centralized or outsourced commodities
- Appropriate & timely access to information.

Table 4
- Connectivity – core services
- Flexibility in adopting new technology
- Provide access to current technology on campus
- Analysis from the “ground up”

Table 5
- Faculty IT liaison
- IT is plumbing
- Help make good decisions
- Provides resource for innovation and facilitate change
- Local support should provide strategic help
- Improve communication and break down boundaries
**Table 6**
- Synergy / Information -> Exploit leverage diversity
- Openness – Transparency
  - Decision making
  - Direction
  - Information sharing / openness availability
- Change happens!
  - Security / desktop / privacy
  - Reward innovation
- Funding model – business model
  - Central v. “local”

**Table 7**
- IT provides transparent process and mechanisms for decision making in areas such as
  - Minimal standards
  - Communications
  - Assessment with assigned accountability and responsibility without stifling
    - Innovation
    - Adaptability
    - Flexibility
Appendix B: Current State Measurement

Retreat participants worked in small groups (seven tables) to begin a dialogue regarding the current state of IS&T at UF. Their work was framed in response to the following questions:

- What works?
- What needs improvement?
- What is missing or needed?

The listings below are a transcription of the individual small group work by table.

Table 1

<table>
<thead>
<tr>
<th>Works</th>
<th>Improve</th>
<th>Missing / Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Residence hall network</td>
<td>- Accelerated adoption of new technologies</td>
<td>- Overall campus accountability &amp; direction</td>
</tr>
<tr>
<td>- Talented people (uneven)</td>
<td>- myUFL (main UF portal)</td>
<td>- Consistent commitment of services</td>
</tr>
<tr>
<td>- Basic IT Services available</td>
<td>- Web information &amp; data (main campus &amp; units)</td>
<td>- Money</td>
</tr>
<tr>
<td>- Gatorlink login for student services</td>
<td>- IT salaries, training, challenges</td>
<td>- Industry standards and best practices environment</td>
</tr>
<tr>
<td>- Basic university finances – we pay our bills</td>
<td>- Inter-unit cooperation</td>
<td>- Vertical application</td>
</tr>
<tr>
<td>- Wall plate services (CNS)</td>
<td>- Priority</td>
<td>- Securely move and share large amounts of data anywhere</td>
</tr>
<tr>
<td></td>
<td>- People (uneven)</td>
<td>(repository)</td>
</tr>
<tr>
<td></td>
<td>- User knowledge base</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Customer service quality</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Recognition of different “categories of customers”</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Off-site access/connectivity</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Access to and use of university data</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Upper level support for IT (budget, policy, strategic direction)</td>
<td></td>
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<tr>
<td></td>
<td>- Collaborative learning environments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Distance Education &amp; services</td>
<td></td>
</tr>
</tbody>
</table>

Common Themes
- Attention to resources (people & money)
  o More
  o Better utilized
- Personnel
- Accountability / Direction / Coordination
  - “Make something happen”
- Adoption of “Best Practices”
  - Improved services
- Special Needs / Unit Needs

### Table 2

<table>
<thead>
<tr>
<th>Works</th>
<th>Improve</th>
<th>Missing / Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>- IFAS statewide network</td>
<td>- More seamless off campus</td>
<td>- IT Planning</td>
</tr>
<tr>
<td>- Outreach web sites</td>
<td>- Bandwidth</td>
<td>- IT Budgeting</td>
</tr>
<tr>
<td>- Local IT</td>
<td>- Off campus connectivity and Quality of Service</td>
<td>- UF Strategy</td>
</tr>
<tr>
<td>- Core Network</td>
<td>- Transition staff from old to new</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Communication – What’s happening in IT</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Data access to collections</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Resources</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- IT Collaboration</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Clientele access (secure, authenticated)</td>
<td></td>
</tr>
</tbody>
</table>

### Table 3

<table>
<thead>
<tr>
<th>Works</th>
<th>Missing</th>
<th>Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Security</td>
<td>- Communal Database (HR, Finance, Student)</td>
<td>- University:</td>
</tr>
<tr>
<td>- Access (minimal)</td>
<td>- Standard / Regular upgrades</td>
<td>- Directory</td>
</tr>
<tr>
<td>- Infrastructures, facilities (distributed)</td>
<td>- Single image directory (names, etc)</td>
<td>- Calendaring</td>
</tr>
<tr>
<td>- Business models exist</td>
<td></td>
<td>- Uneven Desktop support</td>
</tr>
<tr>
<td>(service charge vs.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>central)</td>
<td></td>
<td>- Common file share</td>
</tr>
<tr>
<td>- Flexibility</td>
<td></td>
<td>- IT literacy (how to do things)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Central Database service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Uneven network access</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Student Systems</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- More student access</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Faculty tools-grades, and Web CT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Feedback tools</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Student feedback</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Staff (HR, etc.)</td>
</tr>
</tbody>
</table>

12
Survey Tools
- Common IT Needs. But don’t interfere with specialized/entrepreneur
- Biggest issue-costs/funding. Standards with appropriate funding
- Common good / universal
- Issues - central
- Minimum standards
- No standard email / communications methods (inefficient)
- All need network, email, share info (files), secure
- No common methods (share files), needs to be easy
- Listservs – to class, section, etc
- More scientific access – Database & Tools for Research

Common Themes
- Resources
- Amount
- Distribution
- Charging (fee vs central)
- Central v Distributed
- Flexibility
- Common needs (minimum standards)
- Entrepreneurial
- Ability to go above standard

Table 4
<table>
<thead>
<tr>
<th>Working Well</th>
<th>Not Working Well</th>
<th>Missing</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Local / desktop support</td>
<td>- Lack of continuity in</td>
<td>- Sustainable funding</td>
</tr>
<tr>
<td>(local needs)</td>
<td>centralized support</td>
<td>model</td>
</tr>
<tr>
<td>- Classroom support</td>
<td>- Local support specialized</td>
<td>- IT Training / Certification</td>
</tr>
<tr>
<td>(centralized)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Email (local)</td>
<td>- Access to remote sites</td>
<td>- Knowledge of available</td>
</tr>
</tbody>
</table>
Password management / authentication
- Decentralized web hosting / design / accessibility
- Wireless access
- Dissemination of available resources

services
- Knowledge of IT among admin
- Definition of critical mass / FTE requirements
- Incentives for partnering
- User requirement documents

Table 5

<table>
<thead>
<tr>
<th>Works Well</th>
<th>OK</th>
<th>Does Not Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gatorlink</td>
<td>E-mail service-duplicated effort</td>
<td>PeopleSoft contracts and grants</td>
</tr>
<tr>
<td>myUFL (overall)</td>
<td>UF-AD other depts. - shared support</td>
<td>HR, e-Recruit candidates with out qualifications</td>
</tr>
<tr>
<td>Overall IT</td>
<td>Desktop support-variable quality (number of people). Need diversity.</td>
<td>UF 392-HELP Futile! What organizations? 1st tier filters too much without resolution! Need track number?</td>
</tr>
<tr>
<td>E-mail service ok</td>
<td>Software service</td>
<td>- Support for unanticipated needs, needs improvement</td>
</tr>
<tr>
<td>UF-AD some depts.</td>
<td>Desktop support (local)</td>
<td></td>
</tr>
<tr>
<td>Networks outside core building</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change password</td>
<td></td>
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</tbody>
</table>

Common Themes
- Centralized-Distributed (variability)
- Funding
- Technical Support- Help Desk

Table 6

(Initial Discussion)
Distributed or centralization (define)
- Need for? Lose flexibility
- Cost basis only?
- Economy of scale

Current State
- Which units don’t have basic needs (all have needs)?
- Conduct survey to:
  o Determine what units need
  o Who runs IT in each unit?
- Needs Assessment campus wide

What is real problem here?
<table>
<thead>
<tr>
<th>What Works</th>
<th>What’s Not Working</th>
<th>What is Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Network System (core, switches)</td>
<td>- Core operating principles</td>
<td>- More services (web updating, data storage, remote &amp; wireless)</td>
</tr>
<tr>
<td>- Current System in Units?</td>
<td>- Minimum security standards</td>
<td></td>
</tr>
<tr>
<td>- Decentralization (just need more resources for basic needs from some units. See Needs Assessment above)</td>
<td>- Knowledgeable staff</td>
<td>- More staff support for web updating</td>
</tr>
<tr>
<td></td>
<td>- Sufficient storage space</td>
<td>- Wallplate support</td>
</tr>
<tr>
<td></td>
<td>- Personnel Assistance</td>
<td>- More resources ($) to units to manage themselves</td>
</tr>
<tr>
<td></td>
<td>- IT Audits</td>
<td>- Tech Fee for students</td>
</tr>
<tr>
<td></td>
<td>- Fix PeopleSoft</td>
<td>- College collaboration facilitated by IT central</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Student Services</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Core Operating Principles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Flexibility within centralization</td>
</tr>
</tbody>
</table>

**Common Themes**
Decentralization seems to work.

**Table 7**

<table>
<thead>
<tr>
<th>Works well</th>
<th>Needs Work</th>
<th>Needs Improvement</th>
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<tbody>
<tr>
<td>- Nimbleness</td>
<td>- Balance efficiency and effectiveness</td>
<td>- Equalizing the playing field</td>
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<tr>
<td>- Encourage nimbleness</td>
<td>- Cost effectiveness goal?</td>
<td>- Weakness- IT not perceived as a “given”</td>
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<td>- Consensus, vision, direction - ITAC Committees</td>
<td>- Workstation standards</td>
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<td>- Communication between groups</td>
<td>- Resources for smaller units</td>
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<td></td>
<td>- IT vs. Business</td>
<td>- Conflict of haves and have not’s</td>
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<td></td>
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<td>- Process to try new thing -&gt; then standardize</td>
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<td>- Research</td>
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<td>o Unlimited space</td>
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Appendix C: Agenda and Background Reading

Agenda:
- Welcome
- Purpose of Retreat (See “Overview”)
- Reviewed Definition of Information Services & Technology:
  “Information Services & Technology in its broadest definition includes organizations, functions, processes, knowledge, systems, tools and training in support of creating, acquiring, processing, storing, transmitting, utilizing and securing information”.
- Reviewed Agenda
- Discussed Retreat Outcomes and Deliverables
- Retreat Participants will develop “Recommendations” (to counsel or advise). No “Decisions” (the act of reaching a conclusion) will be made. All Participants will review a draft of the Retreat Report and provide corrections/revisions. The final report will be then forwarded to UF leadership for their review and consideration.
- Discussed approach to the day’s work
  - Foundational Planning
  - Small and Large Group Dialogues
  - Ground Rules
- Performed ‘Current State Measurement’
- Break
- Synthesized ‘Current State Measurement’ work and identified Common Themes and Planning Areas
- Lunch
- Discussed Purpose of IT
- Formulated ‘Strategic Statements’
- Break
- Formulated ‘Recommendations’
- Wrap Up – Finalized content of Retreat Report
- Adjourned

Background Reading:

The following document and articles were provided in advance of the retreat to participants as background reading. The full text may be accessed via link at http://www.it.ufl.edu/reorg/meetings/

* “A Brief History of IT Strategic Planning at UF”
* Breaking Out of the IT Silo: The Integration Maturity Model - Educause
* Information Technology Alignment in Higher Education Roadmap - Educause
* Six IT Decisions Your IT People Shouldn't Make - Harvard Business Review
Appendix D: Retreat Participants List

Jan van der Aa  
Assistant Vice President  
Information Services/CIO  
Health Science Center

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Associate Director, Technology Services  
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Student Senator  
Liberal Arts and Sciences  
Student Government

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Executive Associate Dean  
College of Dentistry

Jeri Benson  
Professor  
Associate Dean for Academic Affairs  
College of Education

Michael Blachly  
Director  
University of Florida Performing Arts

Frank Bova  
Professor, Neurosurgery  
Chair, Computing Information Services Committee  
McKnight Brain Institute  
College of Medicine

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President  
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Chief of Staff  
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Manager of Electronic Communication and Instructional Technologies  
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Mike Conlon  
Director of Data Infrastructure  
PeopleSoft Implementation Officer  
Enterprise Infrastructure

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Director, UF Libraries Support Services  
Library

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Acting Director of IT  
IFAS
Anthony Dasta
Interim Dean
Professor
College of Design, Construction and Planning

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Scientist
Director of High Performance Computing Center

Nick Dunham
Director, Graduate School IT Services Research

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Director
Computing and Networking Services

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College of Public Health and Health Professions

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Human Resource Services

Marc Hoit
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Interim Chief Information Officer
Administrative Affairs

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IFAS

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Dean
Associate Vice President
College of Engineering

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General Counsel

Maureen Long
Assistant Professor
Large Animal Clinical Sciences
College of Veterinary Medicine

Charles Napier
Chief Technology Officer
University of Florida Foundation
Development and Alumni Affairs

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Anesthesiology and Biomedical Engineering
Health Science Center

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Director
Office of Museum Technology
Florida Museum of Natural History

Joy Rodgers
Internal Communications Coordinator
University Relations

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Student Affairs
Jack Sabin  
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IT Director  
College of Liberal Arts & Sciences

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Faculty Group Practice  
Business Services and Clinics

Elizabeth Shenkman  
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Department of Epidemiology and Health  
Policy Research and Department of Pediatrics  
Director, Institute for Child Health Policy  
Health Science Center

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Associate Dean for Distance Education  
DOCE

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Interim Associate Dean  
Assistant Professor  
College of Agricultural and Life Sciences

Pete Vergot  
District Extension Director  
IFAS Extension

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Co-Director, Medical Informatics  
Jacksonville  
Health Science Center

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College of Health & Human Performance

Joe Wilson  
Assistant Professor  
College of Engineering  
Faculty Senate

John Wright  
JM Executive Assoc Dean  
Academic Technology Committee Chair  
College of Journalism & Communication

Mary Yawn  
Director of Finance  
Harn Art Museum

Fedro Zazueta  
Professor  
Director  
Academic Technology
Additional Attendees:

Dwight Bailey
Director of Museum Technology
Harn Art Museum

Alberto Riva
Assistant Professor
College of Medicine

Roberto Hernandez
Student Senator
Student Government

Visitors:

Aravind Asthagiri
Professor
College of Engineering

Jeff Capehart
Senior IS Auditor
Office of the Inspector General

Dmitry Kopelevich
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Anthony Ladd
Professor
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William O’Dell
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Associate Director, UF IAIMS
Health Science Center

Christine Schoaff
Bridges Change Control Coordinator

Joe Spooner
Director of IT Services, CALS