

## UCLA Strategic Planning Task Force

Session 1 Notes: Vision & Priorities

4 November 2008

### SWOT Analysis

The Task Force assessed the IT capabilities of the campus in terms of strengths, weaknesses, opportunities and threats:

#### Strengths

- Key capabilities and resources that may be used as a basis for competitive advantage

#### Weaknesses

- Absence of strengths that are required to compete effectively

#### Opportunities

- A favorable situation in the external environment that presents a possibility for strategic advancement

#### Threats

- An unfavorable situation or risk in the external environment

These results are summarized below.

#### Strengths

- Depth of knowledge across the campus
- Active interdisciplinary in terms of types of IT & content
- Investment in IT (historic and present)
- Organized committees that can communicate across campus
- Engagement at the senior planning level around IT through good mechanisms like ITPB
- Pockets of innovation, creativity, leading edge thinking
- Engagement of faculty and students
- IT savvy group of students/faculty
- Willingness to collaborate and seek ways to leverage each other
- Everyone has same goal to make UCLA the best it can be
- Our scale and capabilities are large enough to be leveraged by other campuses
- We do care about intellectual property and have moved aggressively to think about academic and research intellectual property as an institution e.g. Creative Commons licenses
- Our attention to privacy and data protection
- We have confidence that something will be done to create greater impact by IT

#### Weaknesses

- Lack of fair representation in IT matters
- Fragmentation of IT infrastructure
- Lack of knowledge of what we actually have
- We are approaching the end of useful life of our IT infrastructure
- Succession management of IT (losing some of our most experienced IT staff)
- Difficult to compete for qualified IT staff

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- Lack of money
- Lack of coordination of IT investment
- No coherent plan for IT at UCLA
- Lack of central plan; no rationale for investment
- No understanding of what IT is required for future students
- Research projects need to plan for longer term IT needs
- No cohesive security, disaster recovery strategy – cost prohibitive due to decentralization
- Introverted to the outside world – want to do it ourselves
- Slow to collaborate with outside world
- Too many interfaces for students/faculty
- Don't behave institutionally with regard to IT
- Don't have a well developed life cycle approach to IT (replacement)
- Don't have a good method of evaluating commercial solutions
- Culture impedes synergy
- “In the barn” mentality
- Not anticipating where the puck is going on IT – need to be futurists
- Short term IT financial investment outlook
- Don't have good mechanism for polling our customers of IT (faculty, administrators, students) to determine their needs
- We don't value some what we have done in some key areas e.g. IT Governance
- We have tended to leave some strategic campus issues to individuals and departments to deal with and don't have a campus solutions to these issues
- We don't really understand what the process is for storing, curating and refreshing data and information. We have focused on data and information containers and not how we will share information

### Opportunities

- Leadership is interested in using IT to solve real problems
- Develop common set of key performance metrics and indicators for IT
- Be part of a UC Grid
- Leverage UC initiatives
- Economies of scale – advocate & lobby within UC; vendors and suppliers
- Leverage our financial muscle with vendors etc to deal with issues such as convergence
- Extract more benefit from key vendors, e.g. Cisco, Microsoft, and our investments with them; use our scale and size (procurement/access to technology)
- Makes things better and not let perfection get in the way
- Exploit “best in class” – understand where pockets of innovation are, see where they can apply to other parts of campus. Not all parts of campus have to do everything the same; let's not reinvent the wheel.
- Augment our IT capabilities around a UCLA brand and IT Vision
- Tap into the student base for help

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- We have high aspirations in moving this forward
- Balance local autonomy with institutional IT needs
- Archaic systems represent an opportunity for better institutional systems
- Collaborate with UCSD on data preservation

### Threats

- Budget cuts will force the wrong decisions on IT
- An extreme focus on efficiency will move our focus away from the IT needs of research and education
- Research and education “data deluge”
- If we don’t fix our IT infrastructure, we won’t be a first class institution
- No Total Cost of Ownership (TCO) view of IT
- Disaster recovery
- Increase in security threats
- Scalability of IT cost structure – won’t be able to fund it
- Lack of trust
- Not knowing how the clout of the Office of the President will be exercised

### Vision Statement Breakout Group Thoughts

The Task Force members reviewed and discussed improvements and changes to an IT Vision Outline that had been circulated to them prior to the session.

### OVERALL

1. The first sentence in the Vision Outline is too grandiose. We want institutional capabilities that are complementary at the departmental level. Need to reword.
2. We must be careful how we define “institution” – does it encompass all of UCLA, UC, beyond?
3. Problem with the way the second paragraph in the Vision Outline was worded, it’s a little awkward.
4. Intellectual property portion was missing. Big hole missing right now on how to get technology; Moodle example, CCLE
5. Some of the statements in the vision are too assertive e.g. “We will ...”
6. Public mission is missing from the statement. We need to add this and connect it to our goal of civic engagement, but it might be best to state them as separate goals.

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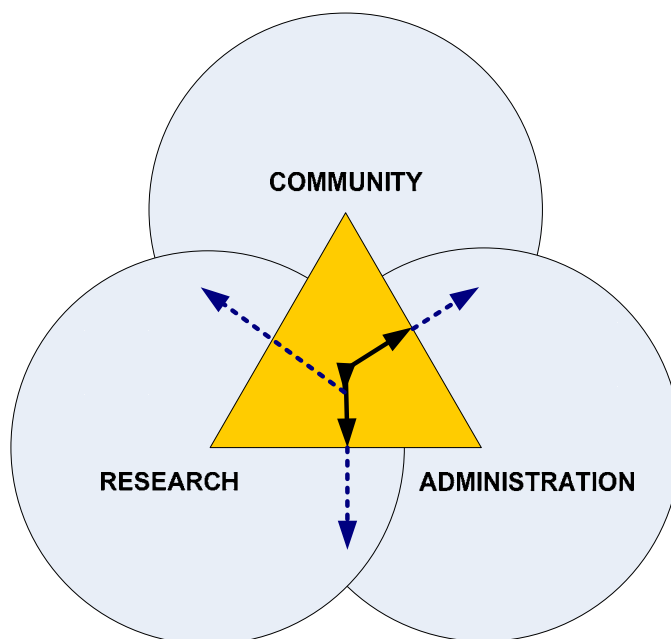
7. What is the relationship of the document as a whole to the UC system. Vision and system-wide goals?
8. Words that we felt would convey the vision":

Nimble	Delivery
Robust	Enable
Balanced	Access
Leadership	Stewardship
Rational decision-making	Cyberliving
Boundary-less	Digital Citizenship
9. Need to create the environment for digital citizenship. Share responsibility with our citizens. Need to find a way that doesn't cede responsibility to let them do anything they want, but we don't want to put boundaries on them either. Data and technology should be as free moving as possible.
10. Autonomy vs. control – accept the point of flex.
11. Look at more than just the primary, and expand the document.
12. Need more spark to the vision, rather than a dull piece of paper!
13. I am intrigued by the Vision Outline but not terribly excited.
14. It is important for us to agree on the SWOT analysis before we flesh out the vision so we can ensure that we capitalize on the Strengths, address the weaknesses, etc.
15. We should acknowledge that ultimately, the majority of resources to make this vision happen will come from individual units, not centrally. Eventually each Task Force member needs to answer the following two questions:
  - Do you see yourself in this plan?
  - Can you aggressively support the plan?
16. What was “desperately lacking” was a graphic. The task force discussed how we might be able to summarize and communicate the vision through a picture, graphic or animation. Overlap of the needs of the communities. Begin with the overlap and then get into larger concentric circles. Core purpose is to deliver primary core services and expand outward.

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“We should begin at the center and build outward to create core services and shared infrastructure that enables people in these communities to exercise their digital citizenship”

### EDUCATION

1. Education – distant – projections
  - Student expectations – we have IT savvy high schools and some incoming students are dissatisfied with the level of IT capabilities we provide for students
  - Globalizations – people want to do things globally
  - How do you keep them connected back to the campus?
  - Personal interaction is important in keeping them connected
  - Develop a way to handle cyber experiences that still promote social interactions
  - Receiving – in terms of education
  - Projecting – education, as well (copyright, etc)
2. Education needed to be expanded in the Vision outline. We need to say more on how IT will foster the fusion of education, research, interdisciplinary scholarly interaction and so on. We also need to explain how to do that, especially with limited resources.

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3. We are missing the NSF Cyberlearning initiative, and bringing in how to work with K-12 schools so that they're working better and students are starting off better.
4. "Develop" or "enhance" IT skills for faculty and students to become more IT savvy rather than stating that "they will have."
5. Language of the document does not express the broad educational experience of students – reality of social networks, principles of citizenship, peer-to-peer file sharing, ways to connect to students as development of citizens. We can zap them or we can instruct them in cultural values. Also to support them in the communities they are building themselves. Look at the broader student experience.
6. Graduate education is missing from the document – same for professional schools. Specific needs that don't hit the broader campus should be reviewed.

### RESEARCH

1. Research Data
  - Genomics – is going to be extremely important in terms of biology and behavior in the next decade
  - We are generating large volumes of data in areas such as energy research, social science, climatology, and public health. Importance of the size of "n". Think of this in terms of disease – the more globally impactful, the more data will be necessary.
  - Before becoming a leader in data analysis, we will need to get stronger in institutional data management of research data. Up to now this has been the duty of the individual researcher. We need a more institutional view of stewardship and archiving of data. We will need some centralized data management systems.
  - Common IT infrastructure will also be impacted in terms of this institutional view of data. People who shift between all these areas of research will need the systems and the ability to share and reuse the data.
2. Research – we're not sure how UCLA would be the leader in the three areas mentioned in the Vision Outline (1. Data Analysis, 2. Digital Media, and 3. Computation-based research.) UCLA should be able to change directions rapidly and the areas we focus on should not be so rigid.
3. Data management should be very important. It could make or break UCLA.

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### SCHOLARLY INTERACTION

1. We need more detail on how to enhance how faculty and students interact; students and students will work together, especially with less money.

### PRODUCTIVITY

1. Use of the word “enterprise” – it is not commonly accessible terminology.

### INFRASTRUCTURE

1. We have to have a wireless business model for the campus.
2. Students who are coming to UCLA now are geared more toward smart phones and expect to be able to use it download and access information.
  - Problems – size. Faculty members won't be able to read screens
  - Mobile – iPod to plug into larger screen
3. We will need governance on campus to recognize how society is moving toward this business model and determine how the campus will embrace this.
4. Goal to have scholarly activity – security and software in making scholarly activity accessible. We need tiered security – not all things need to be as secure
5. Infrastructure. We need a way to assess technologies correctly. When implementing, we need to asks is this the correct direction for campus? We need ongoing evaluation – the vision needs to be more nimble. Need to be able to change directions without feeling like resources were wasted. Has to be shared with campus.
6. Security information – standardized manner of handling data. Security considerations of data have to be built in from the beginning. We have to be able to manipulate data differently, but have standards.
7. We need to be more eager to adopt newer technologies that may render other systems obsolete. How to adopt new technology is a technology life cycle management issue. We need a plan to adopt new technologies. However we also need to protect ourselves from ‘chasing rabbits down rabbit holes’ when pursuing new technology.

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### **Task Force Thoughts on Further Information Required**

The Task Force discussed other information they might need to inform the IT Strategic Plan:

1. Is there another campus that is more advanced in their IT vision?
2. It would be good know the visions of the five major campuses in the UC system.
3. How are we taking student input? If at all?
4. Is the collaboration site for the IT Task Force private? Yes.
5. We should make use of Focus groups. Focus groups should include faculty, students, and staff. The Library has trained focus group leaders.
6. Academic planning documents – from Maryann – how to bring into the picture?
7. We need an outside perspective, so we don't too introspective. Involve some external participants.
8. Bring speakers in who can talk about future trends of information technology. Someone who can speak to the future of IT. (New grad students, new faculty, external speakers, vendors etc.) Henry Samuelli – would be interesting; perhaps use our Gartner contacts and others.
9. We need more in the vision statement to align with our goal of Civic Engagement.

Session notes prepared by: Stephanie Hokama & Mel Barracliffe.  
Additional input from Task Force Member Gary Strong included Nov 7, 2008.