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# Are there seats for everyone in your strategic planning and execution?

**Leadership track: Women Advance IT Leadership conference**

November 5-6, 2019



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# Land Acknowledgement

- In Iowa City where we prepared this presentation, we did so on the ancestral land of the Báxoje Máya<sup>n</sup> (Ioway), oθaakiiwaki·hina·ki (Sauk) & Meškwahki·aša·hina (Fox) people, and the and the Očeti Šakówiŋ (Sioux).
- Here in Lincoln, we are on the ancestral lands of the Paariru (Pawnee) and the Očeti Šakówiŋ (Sioux).
- To learn more about these people and what we owe to them, we recommend your look for indigenous authors such as Walter Echo Hawk of the Pawnee nation, who writes about the law, justice, and shares novelized accounts of the people of the plains.

# Introductions



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# University of Iowa



- Located in Iowa City, Iowa
- One of two UNESCO Cities of Literature in the U.S.
- 32,948 students
- 850 FTE IT staff
  - 200 distributed; 300 central IT;  
350 healthcare
- 1999: campus wide IT community established
- 2016: OneIT community formalized, including central IT organization, colleges and administrative units
- 2017: Integration effort between OneIT and healthcare IT initiated





# OneIT strategic planning at Iowa

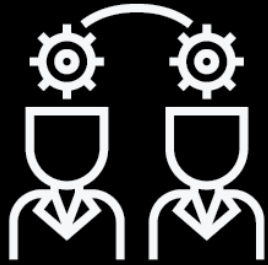


- 2018:1st OneIT strategic plan published
- IT leaders were primary work group
- Stakeholder and IT community input throughout
- Fast cycle process
- Five workshops total; three in one week
- Pre-work and homework between workshops assigned
- Writing team developed initial plan
- Nine strategic goals developed

# Nine Strategic Goals



- Teaching and learning
- Research
- Data
- Innovation
- Partnerships
- Risk/security
- IT evolution
- IT workforce of the future
- Effectiveness and efficiency



**Goal #8:**

## **IT Workforce of the Future**

**OneIT will meet the future needs of campus with a diverse, inclusive, and engaged workforce by attracting and retaining exceptional staff, and making career growth and development opportunities a valued part of the organizational culture.**

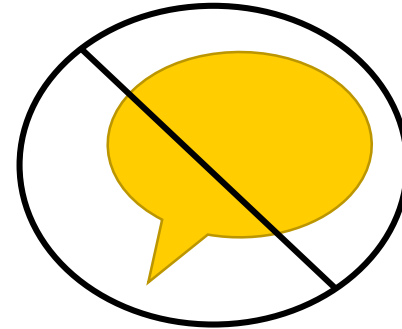
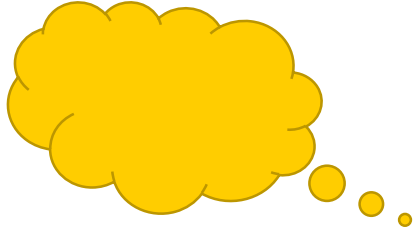
# Identifying strategies

- Highly interactive process
- Involvement from various stakeholders & governance groups
- Facilitated by accountable leaders
- Multiple iterations
- Strategies prioritized



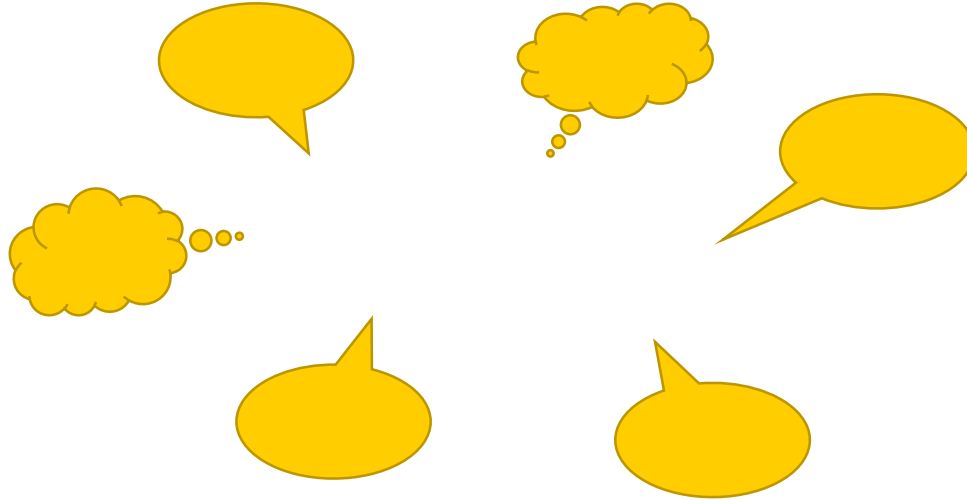


# Simulation: Personal Time



- Read the wording of Goal 8 (Gold card).
- Take a white card. This is the strategy you will be bringing forward to your group.
- Consider for yourself (no discussion yet!):
  - How does this strategy support the goal?
  - Difficulty?
  - Cost?
  - Impact?

# Simulation: Prioritization



- Talk about the strategy you have in front of you with your group.
- Select the top three strategies at your table.
- Prioritize the top three in order.
- You will have about 10 minutes to do this.

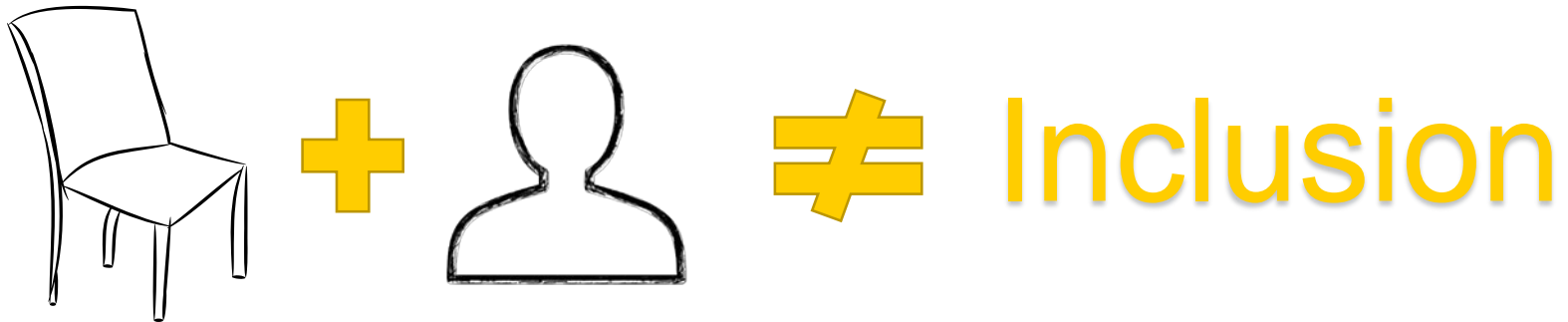
# Discuss at your table for 10 minutes

- How did you decide what the top priorities were?
- Did everyone have a chance to speak and share their thoughts?
  - Did anyone advocate for someone else's position?
  - How did facilitation happen at your table?
- How did this impact the outcome?

# Strategic Planning: Some lessons from Iowa

- Make sure people know what work is being done at the session *before it starts*.
- Make sure everyone knows if and how things might change after the feedback.
- Listen to others, amplify ideas with merit, even if they aren't yours
- If you are facilitating, make sure you invite all participants to *participate*.
- Think about how you prioritize, not what, but how.

# Strategic Planning: Don't just fill the seat



Bringing someone into the room, getting them into the chair, and not creating the space for them to participate is a lost opportunity.



# From planning to execution: Steps to achieving the goals

Step 1:

Choose a strategy to work on

“Ensure the skills of the university’s IT workforce meet current and future institutional needs”

Step 2:

Initiate a project to move the strategy forward

Develop a job shadowing and job rotation program for IT staff

Step 3:

Get people to help!



WE'LL TAKE...  
WHOMEVER  
THAT IS  
RIGHT THERE.

...AND THAT  
GUY WHO'S NEXT  
TO THE GUY  
BEHIND HIM...  
WE'LL TAKE  
THAT GUY!

Picking  
the  
Team

PICKING TEAMS IN THE ANTARCTIC

|                  | Criteria | Past success | Easy to work with | Likeminded/agreeable | Politically savvy | Available | Raised hand (willing) |
|------------------|----------|--------------|-------------------|----------------------|-------------------|-----------|-----------------------|
| Proposed members |          |              |                   |                      |                   |           |                       |
| Employee A       |          |              |                   |                      |                   |           |                       |
| Employee B       |          |              |                   |                      |                   |           |                       |
| Employee C       |          |              |                   |                      |                   |           |                       |
| Employee D       |          |              |                   |                      |                   |           |                       |
| Employee E       |          |              |                   |                      |                   |           |                       |
| Employee F       |          |              |                   |                      |                   |           |                       |
| Employee G       |          |              |                   |                      |                   |           |                       |
| Employee H       |          |              |                   |                      |                   |           |                       |
| Employee I       |          |              |                   |                      |                   |           |                       |
| count (out of 9) |          | 0            | 0                 | 0                    | 0                 | 0         | 0                     |
| percentage       |          | 0%           | 0%                | 0%                   | 0%                | 0%        | 0%                    |

# Deciding who to include: Considerations for picking teams

- What are our guiding principles?
- What are the intended outcomes of the project?
- Who are the stakeholders and beneficiaries?
- What attributes are important for the members of this team?
- What message will the makeup of this team send, and how will we explain who was selected?

# Critical attributes for our team



- Effective
- Broadly representative
- Diverse - multiple dimensions
- Institutional knowledge
- HR expertise



# Matrix: criteria & people

|                  | Criteria | Manager | Individual Contributor | Central IT org | Healthcare IT org | Distributed IT org | Early Career | Mld-Career | Senior | Significant experience on this campus | Professional experience outside campus | HR Expertise | Prior involvement in initiative |
|------------------|----------|---------|------------------------|----------------|-------------------|--------------------|--------------|------------|--------|---------------------------------------|--|--------------|---------------------------------|
| Proposed members |          |         |                        |                |                   |                    |              |            |        |                                       |  |              |                                 |
| Employee A       |          | 1       | 0                      | 0              | 1                 | 0                  | 0            | 0          | 1      | 1                                     | 1                                      | 1            | 0                               |
| Employee B       |          | 0       | 1                      | 1              | 0                 | 0                  | 0            | 0          | 1      | 1                                     | ?                                      | 0            | 0                               |
| Employee C       |          | 0       | 1                      | 1              | 0                 | 0                  | 0            | 1          | 0      | 1                                     |  | 0            | 0                               |
| Employee D       |          | 1       | 0                      | 1              | 0                 | 0                  | 0            | 0          | 1      | 1                                     | ?                                      | 0            | 0                               |
| Employee E       |          | 0       | 1                      | 1              | 0                 | 0                  | 0            | 1          | 0      | 1                                     | ?                                      | 1            | 0                               |
| Employee F       |          | 1       | 0                      | 0              | 1                 | 0                  | 0            | 1          | 0      | 1                                     | ?                                      | 0            | 0                               |
| Employee G       |          | 0       | 1                      | 0              | 1                 | 0                  | 0            | 1          |        | 1                                     | 1                                      | 0            | 0                               |
| Employee H       |          | 1       | 0                      | 1              | 0                 | 1                  | 0            | 0          | 1      | 1                                     | ?                                      | ?            | 0                               |
| Employee I       |          | 1       | 0                      | 1              | 0                 | 1                  | 0            | 0          | 1      | 1                                     | ?                                      | ?            | 1                               |
| count (out of 9) |          | 5       | 4                      | 6              | 3                 | 2                  | 0            | 4          | 5      | 9                                     | 2                                      | 2            | 1                               |
| percentage       |          | 56%     | 44%                    | 67%            | 33%               | 22%                | 0%           | 44%        | 56%    | 100%                                  | 22%                                    | 22%          | 11%                             |

# The matrix: What it does ... and what it doesn't.

## → What it does:

- Specifies the identities and skills you need for the project
- Broadens the pool for team selection
- Demonstrates why individuals are on the team

## → What it doesn't do

- Ensure that you pick new people instead of the same people you picked last time
- Help you to find people you don't know



# What we learned

- Guiding principles
- Don't be afraid of selection
- Criteria before people; a broader pool is a better
- Make this common practice
- It's about the intentionality, not the tool
- Selections impact everyone
- Be prepared to make mistakes
- Create an inclusive environment

# To sum it up....

- Put out the chairs
- Invite the right people
- Create an environment that encourages participation
- Step back and enjoy the results!



# Resources

- [Native Lands Map](#)
- [Walter Echo Hawk books](#)
- [University of Iowa OneIT Strategic Plan](#)
- [Decision making using the ladder of inference](#)
- [Consensus Decision Making](#)
- Team selection matrix
- Meeting best practices poster





**Questions?**