



INFORMATION SERVICES

2025 STRATEGIC PLAN

University
of Portland



EXECUTIVE SUMMARY

The purpose of the Information Services (IS) department at the University of Portland is to make UP a better place to teach, learn, and work using technology. We do this by providing excellent technical and audiovisual support, implementing and managing our technology and security infrastructure, and ensuring that enterprise and academic applications are reliable, secure, and usable. This requires not only a dedicated and skilled staff, but the foresight to identify and execute strategic projects to improve our current processes and prepare us for future ones. In 2023, the IS department departed from our former cadence of strategic planning in favor of an annual cycle of reviewing trends and areas of need and set goals, above and beyond our normal operational duties, which should better prepare our department and systems for the demands of the future. The **2025 IS Strategic Plan** continues this practice.

Last year's IS Strategic Plan centered on a primary theme of improving on our capacity to **deliver a consistently great support experience** for the UP community, with a secondary focus on improving our capabilities to support greater use of data in operations and develop our project and process management expertise. We crafted goals to support this strategy, following the methodology of John Doerr's *Measure What Matters* and his OKI (Objective and Key Indicator) approach to goal setting – in particular, a combination of specificity and boldness that will drive focused work but will also, by intent, include some goals that are too aspirational to reach but still beneficial to strive for. Of the 26 goals we identified in the 2024 plan, 4 were cancelled because they didn't align with our needs as the year progressed, and 2 were delayed by factors out of our control (these are expected to be completed in 2025). We completed 14 of the remaining 20 projects, reaching a 70% completion rate consistent with Doerr's recommendations. This document includes the full list of our 2024 goals and their outcomes, as well as a list of other notable accomplishments and projects from the calendar year.

The very process of strategic planning was an educational one for our department. We have evolved our approach for our 2025 IS Strategic Plan to better fit the context and reality of our work: a large portion of our time is spent reacting to user and departmental needs, leaving much less time for strategic projects that can build our capacity or improve performance on metrics. In addition, those projects themselves often span multiple years. For new projects, our focus is on small, fast, cheap efforts that can help us learn and evaluate new technologies.

The theme for our 2025 IS Strategic Plan is **Modernization**. Technology and modernization would seem to be natural partners, but to be effective we must find the new solutions and technologies that can benefit UP and make our community's experience less complex and more productive. Our vision for how to achieve this modernization, and our goals for how we will apply that vision to our key service areas, provides a strong and specific set of initiatives for 2025 and beyond.

ALIGNMENT WITH UP'S MISSION, STRATEGY AND VALUES

It's critical that our Information Services strategy be informed by and support the University of Portland's strategic plan, mission, and values. That alignment is central to our departmental purpose, so identifying it is an important element of this strategic plan.

Among the major challenges that UP faces in the upcoming years and will need to address both strategically and tactically is the need to reduce expenses, spend wisely, and prioritize investments that help other departments achieve higher levels of efficacy and efficiency. Many of the goals selected in our strategic planning process are intentionally designed to require minimal up-front investment to get started, create new pathways for future cost-cutting, or explore low-cost ways to add the capabilities and services the University needs to continue attracting and retaining students.

The department must also take a sustainable and ethical approach to its work, highlighting projects and tasks that reduce power consumption or e-waste. We also have a role leaning into and at times leading the discussion on campus on ethical technology decisions, particularly with the rapid spread of Artificial Intelligence technology.

Our work connects with and supports UP's value statements as well. Technology has the potential to create a more accessible and welcoming environment for our entire community, respecting the dignity of each individual through practices like universal design and protection of privacy. A well-designed and thoughtful technology ecosystem on campus reduces frustration and gives constituents more time to focus on teaching, learning, and service.

Finally, technology has always had a special relationship with hope. When technology is implemented correctly, with modernized efficiency, usability, and accessibility, it can help make the impossible seem possible. Hope for a better future, in turn, is a driving force behind so many technological breakthroughs. We are inspired by UP's vision of hope and in turn hope to contribute to it with our work.

REVIEWING OUR GOALS AND RESULTS FOR 2024

Our theme for the 2024 Strategic Plan was to improve our capacity to deliver a consistently great customer experience, and we set goals for IS as a whole and its individual teams around this theme. An important aspect of any annual goal-setting process is accountability. The IS management team reviewed the list of goals quarterly to review progress, celebrate progress, and learn from challenges.

Below is our summary of the 2024 IS Strategic Plan goals, and for each the status and its implications or key takeaways.

GOAL	STATUS
THEME: IMPROVING THE CUSTOMER EXPERIENCE	
Document data flow to directories – Review, document, and fix issues in integrations that feed data from banner to the various people directories on campus	Complete. The documentation was completed. These feeds are now more dependable, though there's hope to simplify further in the future.
Consistently meet with the Banner User Group , specifically to schedule a 2024 Spring meeting of the BUG.	Complete. This should help kickstart a consistent pace of meetings to gather key Banner users.
Write 10 new ServiceNow Knowledge Base articles about Banner	Mostly Complete. At least 8 articles were written. The goal seems solid, but technical documentation is always challenging to get done against other priorities.
Complete Migration from Banner 8 Self-Service	Progress made but blocked. Some missing features in the Banner 9 Self Service modules have forced delay, and some other modules require more coordination and testing to deliver. Nonetheless, quite a lot of progress was made on this goal.
A/V team responds to email requests within 4 business hours	Complete, but not specifically tracked. The team has prioritized response time and believes they have met this goal but lack tracking software.
Deploy an "SOS" button on classroom podiums to simplify asking for help	Cancelled. This was more of a project brainstorm than a feasible goal, and would require substantial resources.
Maintain and improve A/V Team documentation for student workers, such as event setup standards and common first-tier response to queries	Complete, with caveats. This turned out to be more of a minor operational task and didn't feel like it could stand even with other strategic goals in the end. That said, it has been completed.
Pay every renewal for existing services on time. Should late payments take place, identify and remedy any process issues that caused the problem.	Complete, but not specifically tracked. Anecdotally, fewer incidents came up of missing payments, but no formal tracking so it's not certain.

	Overall improvement does seem to have been made
Begin reporting on course content accessibility in the Moodle LMS	Delayed. The Moodle upgrade was both postponed and rocky, forcing this effort back into 2025.
Upgrade Liferay (the Pilots.UP platform) to 7.4 thus beginning our work to improve the intranet experience	Complete. This upgrade also saw some delays but was finished in the final stages of 2024.
Create 15 KnowledgeBase articles for common Cascade CMS tasks	Incomplete. About 3 articles were created. The goal of 15 may have over-estimated how many relevant articles would be possible (admittedly, the right answer is likely higher than 3)
Flesh out the Pilots.UP code writeups in BaseCamp	Complete, but hard to measure. The goal lacked a specific enough measure, but this was largely accomplished during the upgrade, though the repository for the documentation was changed from BaseCamp to GitLab.
Create a Moodle on-demand course for Cascade training	Cancelled. This project idea likely was too high a draw on resources for too little a return.
Update the ServiceNow Responsibility matrix	Complete. The hope is this makes possible a regular review of this documentation so it can be kept up to date.
Implement 5 enhancements in ServiceNow, such as procedures or workflows, to speed up ticket resolution times or reduce the number of tickets staff handle manually	Complete (Emphatically!) The team implemented at least 10 such enhancements in 2024 and built their capacity to continue similar work in the future.
Increase Knowledge Base traffic by 50%, measured as a year-over-year comparison of monthly visitors. The goal is to reach this in at least 3 of the months of 2024.	Progress, but challenges measuring completion. Traffic turned out to be an unsatisfying metric, as bot traffic on the knowledge base has increased substantially. Average meaningful increase across all months is likely around 20%. Some measures that should impact this were only released to production late in the year or are yet to be released, so this will continue to improve.
Streamline the new hire workflow to increase automation and improve new employee experience	Complete. This is another goal that lacked hard metrics to track, but processes were improved and automated, weaknesses discussed both internally and with other departments, and equipment allocations standardized to streamline that process. Anecdotally, number of incidents involving delayed onboarding seem to have decreased overall.
Define Infrastructure-specific catalog items in ServiceNow to improve ticket creation/routing	Complete. While not an ambitious goal, this should have a significant impact to improve response on some requests.

Set up automated ServiceNow tickets for scheduling recurring operational events	Ready but not put into use. Rollout was delayed into January 2025, but the solution has been generated.
Invite student workers to at least two team meetings in IS	May need reconfiguring. The goal of giving students a chance to give feedback to and also learn from IS staff is a good one, but needs to be designed into something that will properly draw student interest and engagement.
THEME: PROJECTS AND PROCESSES	
Schedule IS training workshops on process mapping and project management	Incomplete. A workshop with Prof. Gary Mitchell introduced project management concepts for the IS team. Business Process Analysis did not get covered for lack of a good opportunity and resource.
Conduct as least 2 process collaboration meetings with departments	Complete. The Banner team has worked with the Registrar and Controller's office for dedicated projects focusing on improving processes.
Replace 10 paper processes/forms with automated processes in Dynamic Forms, Etrieve, or DocuSign	Complete. In addition to at least 12 such projects, additional efforts created new automated processes where no existing paper form was being replaced.
THEME: PREPARING FOR FUTURE DATA NEEDS	
Complete 150 entries in the Business Glossary, reviewed for accuracy and clarity	Partially Completed (in retrospect, a difficult target). As of the end of the year, 103 entries were complete. This goal turned out to be ambitious – the team quickly dealt with the simplest entries, but the more complicated ones are much slower going.
Implement Oracle Database Gateway support for Microsoft SQL Server	Cancelled. This was a project under heavy consideration when goals were being identified, but turned out not to be worth it.
Schedule and hold a Data Governance meeting in Spring 2024	Retargeted. With other data definition work underway, we decided not to hold a meeting just for the purpose of holding a meeting. Future coordination with the community may be better targeted at the BUG meetings and direct collaboration with the principal data stewards and report generators, laying the groundwork for future data governance groups once more of the mechanisms are in place for their actions and insight to be meaningful and well informed.

In addition to the work completed in pursuit of our strategic plan goals, we also captured some other accomplishments the team celebrated in 2024. While not a complete picture of the IS team's work (many smaller operational tasks take place smoothly every month, some of them taking considerable effort), this list does highlight the scope of our efforts and impact:

OTHER ACCOMPLISHMENTS AND PROJECTS IN 2024

- Contributed to the successful launch of the Shiley-Marcos Center for Innovation
- Provided substantial technical assistance to the Financial Aid team as they worked to provide student aid packages amidst the "Simplified FAFSA" rollout of 2024
- Conducted an upgrade of the NelNet platform
- Successfully implemented award letters being generated by the CampusLogic system
- Event support for the demanding weekend that combined Commencement and the Board of Regents meeting.
- Provided network infrastructure to support the new Chiles Center chillers
- Assisted in the technology aspects of decommissioning the ROTC trailers and moving that group to their new offices.
- Relocated the Audiovisual team to their own new offices in Franz Hall.
- Supported the launch of the PIA programs and courses on the UP campus.
- Successfully launched StarRez and integrated it with other systems.
- Migrated Moodle to a cloud provider and upgraded it to a new version.
- Adopted OculusIT as an external cybersecurity partner and Security Operations Center.
- Published a new Technology Use Policy
- Negotiated new VMWare licenses at an acceptable price in a climate where some schools have seen upwards of 250% increase in costs
- Launched AI tools for staff, faculty, and students, including Microsoft Copilot and Copilot for Microsoft 365.
- Designed and conducted the "AI Residency" training program, which provided a wide range of UP staff with an introduction to and hands-on experience with Generative AI tools.
- Hosted and participated in a university-wide review of technology practices by Elucian Professional Services.
- Implemented CommVault backups for key enterprise servers
- Nearly 60 servers migrated to Linux 8, with more to do in 2025
- All (known) Windows desktops upgraded to versions of Windows 10 that are currently under support.
- Migrated Banner servers away from requiring COBOL. (Yes, COBOL.)

IS STRATEGIC PLAN FOR 2025

Our guiding theme for 2025 is **Modernization**. What does a modernized Information Services department look like? To answer this, we crafted several vision statements emphasizing key aspects of our idealized modern department:

- **A modern IS department is ready for anything.** While we cannot predict the future, we know some of the challenges that we should expect. Being ready for those challenges means having a playbook for tough situations, flexibility for unexpected circumstances, and a broad portfolio of up-to-date skills across our team so that we can find the right solution no matter the scenario.
- **Modern IS is smart with our resources.** Modernizing is more than just spending money on new toys. It means understanding all the capabilities of the systems we already own so we can get the most value out of them, and it means examining solutions that replace or combine existing contracts rather than adding to them. The proper use of IT saves us money, frees up staff time for better purposes, and reduces our ecological impact.
- **Modern IS enables a data-informed institution.** Modernization of our data practices will give more members of our community clear and wide-ranging insight into how our institution is running and will reduce barriers to making use of that data.
- **A modern institution is accessible to everybody.** Modernized technology should democratize access so that the processes and power of a university are available to all our users, regardless of background or abilities. The IT department plays a key role in teaching accessible design practices and providing the right tools so it's easy to do the right thing.
- **Modern IS moves fast, so we need to as well.** The urge to plan and research can sometimes delay ideas from ever seeing reality. Without being reckless, we will seek out opportunities to try new ideas out hands-on, cheap ways to pilot or learn technologies without breaking the bank, and a priority for activities we can actually get started in and start learning from this year.

In a change from last year, the goals this year are more clearly defined by the organizational unit within IS that owns the task, and we took closer care to describe what success looks like to make completion easier to measure. We also recognized that some strategic work will take the form of multi-year projects and some work can only progress to a certain point before budget resources are necessary; some of our goals are designed to clarify those budget decisions and evaluate potential approaches to future strategic needs.

The full list of our strategic goals for Information Services in 2025 follows.

THE CIO OFFICE AND DEPARTMENT-WIDE

Goal	Value for UP
<p>Develop and deliver artificial intelligence and other advanced technology training and programs for UP staff.</p> <p>Specifically: deliver one new or overhauled training program in each half of the year.</p>	<p>Promote staff innovation and engagement and make UP a better place to work. Cost should be minimal.</p>
<p>In collaboration with HR, Student Affairs and other departments, continue to streamline the onboarding and offboarding processes for students and employees.</p> <p>Specifically: Establish a standardized computer setup, and a list of role-based exceptions defined by managers.</p>	<p>Improves operational efficiency, reduces cost, and makes new employees feel welcome and effective.</p>
<p>Conduct a skills inventory of the IS staff and identify gaps in our current skillset compared to those that we expect to need in the future.</p>	<p>Make sure IS roles and skills are up to date and relevant, improving efficiency and security. Improve staff engagement and retention.</p>

AUDIO-VISUAL SERVICES

Goal	Value for UP
<p>Identify gaps in UP's AV support, either in new technologies that could be better supported or skills that are needed to explore cutting-edge technologies. Build a report of what the most promising classroom technology out there is that UP isn't using yet.</p>	<p>Invites a discussion of what the most impactful technologies may be to pursue, drawing faculty discussion and allowing for investment guided by institutional need.</p>
<p>Review event charges for AV staff time and equipment to ensure appropriate expenses are covered by customers.</p>	<p>Accurately identify the full cost of extra events rather than absorbing it in support departments.</p>
<p>Develop greater synergy with existing resources, such as the AV capabilities of the Chiles Center and the resources of the student Pilots Audio & Lighting organization, to pool capabilities and better serve various events.</p> <p>Specifically: at least 2 events identified where internal resources were identified in place of proposed external services, reducing overall cost.</p>	<p>Potentially reduce outsourcing costs for major event setups by identifying whether internal resources could meet the same needs. Promote collaboration across support teams in different parts of the institution.</p>

CUSTOMER SUPPORT AND DESKTOP SERVICES

Goal	Value for UP
<p>Review and optimize the categories and assignment groups within ServiceNow.</p> <p>Specifically: review and change completed, schedule set for future review.</p>	<p>Enhanced accuracy tracking work processes, improved team alignment, and more precise reporting capabilities</p>
<p>Develop streamlined interfaces for scheduling tech appointments, integrated with ServiceNow tickets</p>	<p>Lower barriers for user support, streamlined process, greater transparency</p>
<p>Update standard University builds to Windows 11 during Summer 2025. Plan and begin the migration of endpoints to the new builds</p> <p>Specifically: Windows 11 used on all new PC deployments by the fall, project plan in place for migrating existing machines. Change management (training, online resources) delivered.</p>	<p>Modernized technical infrastructure, enhanced system security, and improved performance and compatibility</p>
<p>Develop a process for identifying knowledge base documentation that needs to be developed or overhauled.</p> <p>Specifically: Identify what data to use to prioritize this work and assign responsibilities and expectations for the work to get underway. Early bonus goal would be to set a target # of articles for 2025.</p>	<p>Comprehensive and up-to-date knowledge base, reduced resolution times, and improved self-service capabilities for users</p>

INFRASTRUCTURE SERVICES AND SECURITY

Goal	Value for UP
Finalize a formal Incident Response Plan for cyberattacks and conduct at least one “desktop” walkthrough	Provide better structure for responding to a major cyberattack incident.
At least pilot one migration of an application or environment from on-site to a cloud provider.	Facilitates scalability and flexibility with a cost-effective “spend a little to learn a lot” model. Keep options open for the future.
Research and document potential strategies for migrating to more cost-effective hosting in case VMWare continues to get more expensive.	Addresses one of the biggest uncertainties for future expenses.
Identify a provider for voice service and establish a plan and timeline for migration.	Enhances communication infrastructure while potentially reducing costs.
Fully realize partnership with OculusIT for SOC and CISO services into a fully operational cybersecurity program. Specifically: Security analyst reports success in implementation; few or no incidents of “false negatives” by second half of year (i.e. successful attacks that were not detected by SOC)	Strengthens cybersecurity posture and protection against threats at a very competitive price.
Launch at least three purpose-specific security dashboards for users within IS.	Engage all IS staff in security responsibilities and ensure any issues are highly visible.
Collaborate with the Shiley School of Engineering faculty to build a technology roadmap, prioritizing work/funding for changes to labs, availability of cloud resources, and network changes.	Make more relevant technology resources available for use in Shiley curriculum, improving student experience and educational value.
Research and plan possible projects to utilize more of Microsoft’s enterprise administrative capabilities (for instance, Defender and SCCM). Specifically: Recommend and plan either greater adoption of the MS365 tools or an alternative.	Optimizes the use of existing tools and enhances administrative efficiency, possibly leading to future savings.
Set a roadmap for transitioning all remaining active UP accounts to full MFA requirement.	Regulatory requirement. Reduce risk and impact of account compromise.
Evaluate next steps in wireless infrastructure support, including new controllers, and build long-term roadmaps (maybe with a few alternative timelines/price structures) for future upgrades.	Plan strategically for future network needs to balance capabilities and cost.

BANNER AND ENTERPRISE APPLICATIONS

Goal	Value for UP
<p>Weigh options for improved integration, system availability, and scalability, in partnership with the Infrastructure team.</p> <p>Specifically: report to CIO with recommendations based on compatibility, fit to future requirements, cost, and supportability.</p>	<p>Enhanced system efficiency, reduced downtime, and better resource management.</p>
<p>Identify pathways to centralized data warehousing/data lake/etc solutions. Attempt to implement one or more in a pilot capacity.</p> <p>Specifically: at least one pilot instance to try housing and reporting on data.</p>	<p>Improved data accessibility and analytics, leading to more informed decision-making. Possible identification of low-cost routes to get started.</p>
<p>Collaborate with UP business offices, for instance the Registrar, Controller, and HR offices, to identify key business processes ready for digital transformation and automation and begin that work.</p> <p>Specifically: at least three production launches of revamped or new digitalized business processes.</p>	<p>Streamlined operations, increased productivity, and reduced administrative overhead.</p>
<p>Modernize the approach to task duties in the Banner team, allowing for greater cross-training and redundancy so multiple people can resolve a critical issue in any module.</p> <p>Specifically: Build a document showing redundant support for all key Banner and Banner-adjacent modules/applications, with plan to shore up any weak areas of support.</p>	<p>Increased resilience and continuity in operations, minimizing the impact of staffing changes.</p>
<p>Build experience with RESTful web services and their applicability to integration scenarios and other requests.</p> <p>Specifically: one successful web service-based integration put into production primarily by Banner team in 2025. List of other potential integrations.</p>	<p>Modernization of staff skillset, better command of integration techniques used by many applications.</p>

WEB SERVICES

Goal	Value for UP
<p>Modernize and revitalize the pilots.up portal and work with departments to migrate information into the next generation intranet.</p> <p>Specifically: the 50 most accessed Pilots.UP site pages should all be last updated in 2025.</p>	<p>Enhanced user experience, streamlined access to information, and reduced information clutter on public web</p>
<p>Contribute to university-wide initiatives such as supporting the UP web redesign project, particularly as it reaches operational deployment stages.</p>	<p>Supporting a critical piece of UP's student recruitment work and ensuring the project is successful. Building skills to sustain website support post-launch.</p>
<p>Develop new tools, possibly using AI-driven technologies such as chatbots, to make it easier for users to find relevant information and conduct their work at UP</p> <p>Specifically: Demonstrate a prototype of in-house developed AI-based (or otherwise innovative) tech for other IS staff.</p>	<p>Improves self-service access to information for the UP community; explore low-cost approaches to use newer technology.</p>

ACADEMIC TECHNOLOGY SERVICES AND INNOVATION

Goal	Value to UP
Lead a committee of faculty and academic professionals to evaluate Learning Management (LMS) platforms in the Spring of 2025, then use the recommendations from that committee to negotiate with vendors and draw up a full proposal for LMS migration.	Our current LMS is a recurring pain point for UP faculty and students, and carries too many hidden costs to administer and manage. This approach to finding a successor is focused on getting maximal input from faculty while also leaving room to find the best balance of features and cost.
Generate reports on current accessibility of UP course content, as well as recommendations for next steps in improving accessibility.	Improves accessibility for all students, promoting inclusivity and reducing barriers while also ensuring better regulatory compliance.
Review training materials and other online information and update to ensure the best information is available to the UP community. Specifically: Fully revise the ATSI presence on Pilots.UP, and plan (and begin) the process of updating ServiceNow Knowledge Base articles (or other training materials) with information and screenshots reflecting the current version of Moodle.	Better visibility for faculty to access information and understand what services ATSI provides, as well as more streamlined paths to getting help.
Improve sustainability and operational stability of academic technology administration. This includes documenting routine processes to ensure continuity, identification of processes that can be improved, and recognizing missing skillsets or uncovered responsibilities that need to be addressed. Specifically: Define a repository for technical documentation and begin documenting standard processes, key vendor contact information, etc. This should be well populated with base information about each application as well as a total of at least 8 administrative procedures documented.	The current operational model for ATSI is a risk factor, as business continuity can be threatened when key staff are absent or busy. This should result in better options in establishing backup support and being prepared for turnover.

NEXT STEPS IN IMPLEMENTING THIS PLAN

Over the course of 2025, the Information Services management team will conduct quarterly reviews of these goals to celebrate progress and address any challenges or barriers. These central meetings will also provide a trigger for individual teams to review their own goal list. A full review of our performance on these goals will accompany the 2026 Strategic Plan.

Over the course of the year, it is possible that new realities will prompt us to add, remove, or alter goals to reflect changing priorities or emerging reality as the year goes on – or, for instance, goals that are tuned to be too ambitious or not ambitious enough.

THE FUTURE BEYOND 2025, AND HOW WE CAN PREPARE FOR IT

As we considered our goals, it was important to consider what challenges we expect in the years beyond 2025. Key driving factors in the years 2025-2027 include:

- Market forces will continue to move more and more products and services into cloud-based Software-as-a-Service and pay-as-you-go services, making it less viable for us to continue to rely as heavily as we currently do on our on-premise hosted servers. Thoughtful preparation now can help our infrastructure and applications staff build their familiarity with cloud-based environments, as well as explore ways that we can leverage those environments to add new capabilities, reduce cost, and improve reliability.
- The reliance on data will grow – more applications will rely on data integration, more internal business processes and decisions will rely on timely and flexible reporting, and artificial intelligence will become a viable or even necessary tool for analyzing and acting on the data. This will benefit from work we do now to improve the consistency of that data and to explore strategies for making more of it available for cross-system reporting.
- It will take ongoing effort to maintain our staff skillsets to keep up with the pace at which technology changes, as well as to smoothly fill needs when staff depart or take on new roles.
- The higher education industry itself will continue to have very challenging years in which schools will compete for students. In this environment, providing a great technology experience for students is a baseline competitive requirement. Information Services will collaborate with faculty in selecting a new Learning Management System for the university.
- It will be more important than ever for IS to be engaged with all the business and academic areas of the University to guide technological decisions in a way that can be supported, sustained, and secured.