IT Strategy 2024-25

How IT will support Earlham College’s Strategic Priorities in FYs 24-25
Message from the AVP of IT (CIO)

What is Earlham’s 24-25 IT strategy?

This strategy document provides an overview of Information Technology Services’ (ITS) direction over the next 2-3 years. It indicates how ITS will align resources, efforts, and budget to support Earlham’s strategic goals and priorities.

ITS leadership and the Technology Advisory Council (TAC) formed this strategy based on input from more than 100 members of the Earlham community as well as the entire ITS team. The key initiatives described in this document will support achievement of the College’s mission and goals.

Thank you to all who helped assess our current state, envision our future state, and prioritize initiatives to close the associated gaps. I look forward to working with all of you in helping Earlham College achieve its strategic goals and objectives.

*Insight: Everything ITS does should support the organization. A good strategy links IT initiatives to organizational goals and objectives. A well-crafted strategy enhances community satisfaction and strengthens relationships.
Earlham College 24-26 IT Strategy At-A-Glance

The IT strategy directly aligns with Earlham’s key initiatives and improves IT product and service delivery. The FY24-26 strategy will shift ITS into a strategic enabler for the College.

**IT EXCELLENCE**

- Build an IT staff development plan
- Implement Microsoft software ecosystem
- Assess and improve Banner environment
- Select and implement new housing software
- Right-size and update student computers
- Update and improve role-based permissions
- Right-size and refresh printer fleet
- Select and implement new advancement software
- Implement security awareness and training program
- Develop and implement ITS communications plan
- Establish software implementation standards
- Review and update service desk processes
- Select and implement new service desk software
- Deploy Windows 11
- Build a software catalog

**ORGANIZATIONAL SUPPORT**

- Increase Customer Satisfaction to**
- Raise % of Highly Effective IT Processes to**
- Improve IT Innovation Leadership score by**

*Info-Tech Maturity Assessment

Current | Target
---|---
Firefighter | Innovator
Trusted Operator | Business Partner
Unstable | 

*IT management and governance diagnostic data

*IT stakeholder satisfaction data
## Key IT initiatives align with Earlham Strategic Goals

<table>
<thead>
<tr>
<th>Business Goals</th>
<th>Selected IT Initiatives</th>
<th>IT Goals</th>
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</thead>
</table>
| Recruit and retain a welcoming, diverse and inclusive community of faculty, staff and students. | Build an IT staff development plan  
Implement Microsoft software ecosystem  
Optimize IT staffing  
Right-size and update student computers (labs and shared devices)  
Optimize Slate  
Develop and implement user training program | Achieved through Organizational Support |
| Build a financially sustainable path for Earlham.                             | Develop and implement IT asset management strategy  
Create a right-sized disaster recovery plan  
Build an information security strategy  
Update and improve role-based permissions and access  
Right-size and refresh printer fleet  
Improve IT spending and budgeting | Achieved through IT Excellence |
| Improve student success and experience (retention, graduation, preparation for next steps in life) | Select and implement new residential management software  
Develop a classroom technology plan  
Design and implement ITS student worker program  
Evaluate and improve Presence and Handshake  
Improve campus-wide digital signage | Achieved through Innovation |
| Establish strong and enduring relationships on- and off-campus.               | Develop and implement IT strategy  
Review and update service desk processes  
Improve requirements gathering  
Select and Implement new advancement software  
Develop and implement ITS communications plan | |
| Create a culture of continuous improvement and assessment.                    | Establish IT governance  
Assess and improve Banner environment  
Determine and implement long-term Banner strategy  
Build a comprehensive data strategy  
Develop a security awareness and training program  
Review and improve IT policies  
Identify and track IT performance measures | |
Earlham’s mission and principles frame IT strategy

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<thead>
<tr>
<th>Earlham College</th>
<th>Information Technology Services (ITS)</th>
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<tbody>
<tr>
<td><strong>Mission</strong></td>
<td><strong>Mission</strong></td>
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<tr>
<td>To provide the highest quality undergraduate education in the liberal arts, including the sciences, shaped by the distinctive perspectives of the Religious Society of Friends (Quakers).</td>
<td>ITS provides innovative technology and services that empower Earlham to fulfill its educational mission. ITS accomplishes this through highly skilled IT staff, best fit solutions, a sustainable technical infrastructure, and adherence to the College’s Principles and Practices.</td>
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<tr>
<td><strong>Principles &amp; Practices</strong></td>
<td><strong>Guiding Principles</strong></td>
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<tr>
<td>• Respect for Persons</td>
<td>• Simplicity</td>
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<td>• Integrity</td>
<td>• Enterprise Value</td>
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<td>• Peace and Justice</td>
<td>• Standardization</td>
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<tr>
<td>• Simplicity</td>
<td>• Customer Focus</td>
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<td>• Community</td>
<td>• Innovation</td>
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</table>
Earlham’s strategic objectives guide IT strategy

<table>
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<tr>
<th>Strategic Initiatives</th>
<th>Recruit and retain a welcoming, diverse and inclusive community of faculty, staff and students.</th>
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<tr>
<td></td>
<td>Build a financially sustainable path for Earlham.</td>
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<td>Improve student success and experience (retention, graduation, preparation for next steps in life)</td>
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<td>Establish strong and enduring relationships on- and off-campus.</td>
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<td>Create a culture of continuous improvement and assessment.</td>
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# Earlham College PESTLE Analysis – Spring 2023

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<tr>
<th>Political</th>
<th>Economic</th>
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<tr>
<td>• Visa restrictions impact ability to recruit international students</td>
<td>• Uncertainty over student aid policies</td>
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<tr>
<td>• Possible state-level restrictions on endowment use</td>
<td>• Demand for more practical programs</td>
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<tr>
<td>• Uncertainty over student aid policies</td>
<td>• Inflationary impact on salary demands</td>
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<td></td>
<td>• Increasing technology costs</td>
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<td>• Possible restrictions on endowment use</td>
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<thead>
<tr>
<th>Social</th>
<th>Technological</th>
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<tbody>
<tr>
<td>• Trend of more lower income students</td>
<td>• Security (permissions, access, etc.)</td>
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<tr>
<td>• Less international and in-state students</td>
<td>• Demand for improved collaboration tools</td>
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<tr>
<td>• Expectations regarding digital offerings for student experience</td>
<td>• Demand for improved data governance, integration and analytics capabilities</td>
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<td>• Need for refresh budget cycle</td>
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<td></td>
<td>• Student lab and classroom technology upgrades</td>
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<td>• Improved use of finance/HR/student data systems</td>
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<td></td>
<td>• Impact and/or potential of advanced AI technologies (e.g. Chatbots, student predictors of success, etc.)</td>
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<thead>
<tr>
<th>Legal</th>
<th>Environment</th>
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<tbody>
<tr>
<td>• Data privacy (e.g. FERPA, GDPR)</td>
<td>• Disaster recovery strategy in dealing with weather events and power outages</td>
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<tr>
<td>• Ever changing federal, state reporting &amp; compliance demands</td>
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<td>• GLBA security requirements</td>
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IT Customer Satisfaction - Spring 2023

IT will focus on the highest importance, but lowest performing services and capabilities to drive improved satisfaction levels and enhance IT service delivery maturity.
IT Process Capabilities - Spring 2023

SE IT Management & Governance Framework

A comprehensive and connected set of research to help you optimize and improve your core IT processes
### Top IT Processes and Accountabilities - Spring 2023

<table>
<thead>
<tr>
<th>Process Area</th>
<th>Criticality Rankings</th>
<th>Most Important Process (out of 18)</th>
<th>Average Importance Score</th>
<th>Most Effective Process (out of 18)</th>
<th>Average Effectiveness Score</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IT Strategy and Governance</strong></td>
<td>1</td>
<td>6th</td>
<td>8.6</td>
<td>2</td>
<td>4.3</td>
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<tr>
<td><strong>Requirements Gathering</strong></td>
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<td>10th</td>
<td>8.2</td>
<td>5</td>
<td>4.8</td>
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<td><strong>Stakeholder Management</strong></td>
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<td>3rd</td>
<td>8.8</td>
<td>15th</td>
<td>4.8</td>
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<tr>
<td><strong>Data Architecture &amp; Governance</strong></td>
<td>5</td>
<td>7th</td>
<td>8.5</td>
<td>11th</td>
<td>5.3</td>
</tr>
<tr>
<td><strong>Asset Management</strong></td>
<td>3</td>
<td>9th</td>
<td>8.2</td>
<td>17th</td>
<td>4.3</td>
</tr>
<tr>
<td><strong>Business Continuity Planning</strong></td>
<td>6</td>
<td>8th</td>
<td>8.3</td>
<td>9th</td>
<td>5.5</td>
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# IT SWOT Analysis - Spring 2023

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<tr>
<th>Strengths (Internal)</th>
<th>Weaknesses (Internal)</th>
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<tr>
<td>• Depth of staff knowledge and experience</td>
<td>• Resource capacity (limited dollars and staff)</td>
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<td>• Service desk</td>
<td>• Lack of IT Governance (federated, ad hoc decision-making, distributed IT spending, security vulnerabilities)</td>
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<td>• Staff customer service oriented</td>
<td>• Impact of not having CIO for lengthy period (e.g., no cheerleader to highlight IT accomplishments)</td>
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<td>• Willingness to innovate</td>
<td>• Lack of process documentation in some areas (and user documentation)</td>
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<tr>
<td>• Network infrastructure</td>
<td>• Data architecture and integration</td>
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<td>• Being able to address specialized requests</td>
<td>• Business applications (e.g., productivity)</td>
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<td>• Change management</td>
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<td>• Internal teamwork (understanding of roles and tools, communication, willingness to collaborate and pitch in)</td>
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<tr>
<th>Opportunities (External)</th>
<th>Threats (External)</th>
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<tr>
<td>• vCISO (GreyCastle) and managed infrastructure partner (Apogee)</td>
<td>• Student enrollment</td>
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<td>• Improved tools and platforms (e.g., data backup and restoration, DNS management &amp; security tool, centralized purchasing, active directory/Azure account management, email filtering)</td>
<td>• Regulation &amp; compliance changes</td>
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<td>• Improved use of existing tools (e.g., Banner audit/assessment)</td>
<td>• Security (internal awareness, increasing external threats, phishing attempts, ransomware)</td>
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<td>• Better definition and implementation of role-based permissions and access</td>
<td>• Limited understanding of ITS’ capacity and capability to deliver solutions.</td>
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<td>• Classroom technology more easily virtualized</td>
<td>• Lack of clarity regarding IT alignment with college goals</td>
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<td>• Seminary relationship(s) and support</td>
<td>• Limited coordination with ITS</td>
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<td>• Automated workflow for common processes</td>
<td>• Lack of knowledge/training for data reporting &amp; analytics</td>
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<td>• Willingness of business to adopt innovation ideas (culture?)</td>
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<td>• Shadow IT in various other departments</td>
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</table>
The IT Strategy and Key Initiative Plan contain projects and initiatives focused on improving our vital core processes and capabilities, aimed at transforming ITS’s role to lead digital transformation at Earlham College.

- **Innovator – Transforms the Business**
  - Reliable Technology Innovation

- **Business Partner – Expands the Business**
  - Effective Execution on Business Projects, Strategic Use of Analytics and Customer Technology

- **Trusted Operator – Optimizes the Business**
  - Effective Fulfillment of Work Orders, Functional Business Applications, and Reliable Data Quality

- **Firefighter – Supports the Business**
  - Reliable Infrastructure and IT Service Desk

- **Unstable – Struggles to Support**
  - Inability to Provide Reliable Business Services
IT Process Improvement

Legend:
- Improve process first
- Improve process second
- Improve process third
Key Initiatives – Overview

2024-2026 IT Key Initiative Plan
Our key initiatives collectively support Earlham’s strategic priorities and improve the delivery of IT services.

1. Organizational Support
   Support Major Organizational Priorities
   These projects deliver or enhance IT capabilities that support critical college operations and/or strategic initiatives.

2. Improve IT Excellence
   Reduce Risk & Improve IT Operational Excellence
   These projects will increase IT process maturity and systematically improve IT.

3. Drive Innovation
   Drive Technology Innovation
   These projects will improve our future innovation capabilities and decrease risk by increasing our technology maturity.
Key Initiatives – Organizational Support

- Develop and implement IT strategy
- Build an IT staff development plan
- Select/implement new productivity ecosystem (multiple projects)
- Assess/improve Banner environment
- Establish IT governance
- Update Banner-Moodle Integration
- Determine/implement long-term Banner strategy
- Optimize IT staffing
- Select/implement new residential management software
- Improve requirements gathering
- Right-size and update student computers (labs and shared devices)
- Create a right-sized disaster recovery plan
- Update and improve role-based permissions and access
- Right-size and refresh printer fleet
- Implement security awareness and training program
- Select/implement new advancement software
- Optimize Slate
- Improve IT spending and budgeting
- Develop and implement ITS communications plan
- ...14 additional projects
# Key Initiative Roadmap – Organizational

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<tr>
<th>INITIATIVE NAME</th>
<th>Q1 24</th>
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<td>Develop and implement IT strategy</td>
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<td>Build an IT staff development plan</td>
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<td>Select new enterprise productivity and collaboration ecosystem</td>
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<td>Replace Zimbra with Microsoft Outlook/Exchange</td>
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<td>Replace Zoom with Microsoft Teams</td>
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<td>Replace Duo with Microsoft Authenticator</td>
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<td>Replace Box with Microsoft OneDrive/SharePoint</td>
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<td>Replace Slack with Microsoft Teams</td>
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<td>Improve Banner environment</td>
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<td>Update Banner-Moodle integration</td>
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<td>Determine long-term Banner strategy</td>
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<td>Optimize IT staffing</td>
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<td>Select new residential management software</td>
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<td>Right-size and update student computers (labs and shared devices)</td>
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## Key Initiative Roadmap – Organizational Support

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<tr>
<th>INITIATIVE NAME</th>
<th>Q1 24</th>
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<th>Q2 25</th>
<th>Q3 25</th>
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<th>Q1 26</th>
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<tbody>
<tr>
<td>Create a right-sized disaster recovery plan</td>
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<td>Update and improve role-based permissions and access</td>
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<td>Right-size and refresh printer fleet</td>
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<td>Develop and implement ITS communications plan</td>
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<td>Inventory and retire SQR programs</td>
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<td>Develop and implement user training program</td>
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<td>Design and implement ITS student worker program</td>
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Key Initiatives – IT Excellence

- Develop and implement IT asset management strategy
- Implement new cloud-based email filter
- Establish software implementation standards and playbook
- Review and update service desk processes
- Build a software catalog
- Build an information security strategy
- Complete network infrastructure redesign
- Fully implement Intune/AutoPilot and Jamf Connect
- Deploy Windows 11
- Select new service desk software
- Implement new service desk software
- Develop effective IT project management processes
- Upgrade/retire services running Microsoft Server Operating System 2012
- Retire old “ECS” domain
- Establish security governance & management
- Fine tune service desk processes
- Upgrade/retire servers running CentOS 7.x
- Improve internal IT controls and protocols
- Select and implement vulnerability scanning software
- Standardize personal computer operating system environment
- Review & improve IT policies
- Standardize server operating systems
<table>
<thead>
<tr>
<th>INITIATIVE NAME</th>
<th>Q1 24</th>
<th>Q2 24</th>
<th>Q3 24</th>
<th>Q4 24</th>
<th>Q1 25</th>
<th>Q2 25</th>
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<td>Implement new cloud-based email spam filter</td>
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<td>Complete network infrastructure redesign</td>
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<td>Fully implement InTune/AutoPilot and Jamf Connect</td>
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<td>Deploy Windows 11</td>
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<td>Select new service desk software</td>
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<td>Upgrade/retire servers running Microsoft Server Operating System 2012</td>
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<td>Retire old &quot;ECS&quot; domain</td>
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<td>Fine tune service desk processes</td>
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<td>Upgrade/retire servers running CentOS 7.x</td>
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</table>
Key Initiatives – Innovation

- Build a comprehensive data strategy
- Data strategy project #1
- Data strategy project #2
- Assess potential for AI to enhance service desk
- Assess potential for AI to predict student success and need for intervention
- Assess potential for AI to inform future strategic initiatives
# Key Initiative Roadmap – Innovation

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<thead>
<tr>
<th>INITIATIVE NAME</th>
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<th>Q2 24</th>
<th>Q3 24</th>
<th>Q4 24</th>
<th>Q1 25</th>
<th>Q2 25</th>
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<td>Assess potential for AI to enhance service desk</td>
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</table>
IT Strategy Refresh Cycle

- Determine Impact of Business Strategy Changes: Sept
- Draft IT Strategy Revisions: Sept/Oct
- Strategy Update Review: Oct
- Finalize IT Strategy Refresh: Nov
- Semi-Annual Touchpoint: Dec

Business Strategy Reviews/Exec Discussions

Earlham College IT Strategy 24-25
## IT Performance Metrics

<table>
<thead>
<tr>
<th>IT Performance Metric</th>
<th>Area</th>
<th>Score</th>
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<tbody>
<tr>
<td>Percent of IT initiatives that support organizational goals</td>
<td>Organizational Support</td>
<td>100%</td>
</tr>
<tr>
<td>Percent of organizational goals supported by IT initiatives</td>
<td>Organizational Support</td>
<td>100%</td>
</tr>
<tr>
<td>Organizational IT satisfaction</td>
<td>Organizational Support</td>
<td>66% (2023)</td>
</tr>
<tr>
<td>Organizational IT value</td>
<td>Organizational Support</td>
<td>69% (2023)</td>
</tr>
<tr>
<td>Percent of IT initiatives achieving projected benefits</td>
<td>Organizational Support</td>
<td>TBD</td>
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<td>IT capabilities created or enhanced</td>
<td>IT Excellence</td>
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<tr>
<td>ITS understands organizational needs</td>
<td>IT Excellence</td>
<td>72% (2023)</td>
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<tr>
<td>ITS communicates effectively</td>
<td>IT Excellence</td>
<td>65% (2023)</td>
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<tr>
<td>ITS executes requests</td>
<td>IT Excellence</td>
<td>69% (2023)</td>
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<td>Percent of IT initiatives integrated as part of ITS performance goals</td>
<td>IT Excellence</td>
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<tr>
<td>TBD</td>
<td>Innovation</td>
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