

Tool 4: IT Strategic Goals Workshop Exercise

IT Strategic Goals Worksheet

Instructions: Answer the questions below and be prepared to share them with workshop participants. If your group is evaluating more than one IT activity category, use one worksheet per category. To review the relationships between IT activity categories, goals, and objectives, see p. 15.

1. IT activity category (e.g., “infrastructure,” “people and skills”): _____.
2. As a group, discuss the category to be sure you share a common understanding of its definition and scope. Record major points about the category on the flipchart.
3. Using sticky notes, write 1–3 broad outcomes that your institution must achieve in the next five years in order to fulfill institutional and IT needs in the specified category. You may work individually or with others in your group. These outcomes should cover the whole scope of the category.
4. Read each outcome aloud and put each sticky note on the flipchart. Put sticky notes with similar outcomes close together on the flip chart. As a group, consider ways to consolidate, eliminate, or improve the draft outcomes. Look for gaps in coverage: does anything need to be added?
5. Assign the reviewed/consolidated outcomes to group members. Develop them into strategic goals as follows:
 - The goal should describe a desired state that IT must achieve to address a significant part (or all) of the institution’s needs in the IT activity category.
 - Goals should be broadly stated, clear, and achievable.
 - Each goal should have a short name or title and a more detailed description of no more than 25 words.
 - Write each goal on a sticky note.
6. Post the draft strategic goals on the flipchart for review and comment by the larger group (lightning review round).

Tool 5: IT Strategic Objectives Workshop Exercise

IT Strategic Objectives Worksheet

Instructions: Answer the questions below and be prepared to share them with workshop participants. To review the relationships between IT activity categories, goals, and objectives, see p. 15.

1. IT activity category that your group is evaluating (e.g., “infrastructure,” “people and skills”): _____.

2. For each of the IT strategic goals you drafted in Exercise #1, write 2-5 objectives necessary to achieving that goal. Objectives are actions that meet the following SMART criteria:
 - Specific – Targets a particular area for action
 - Measurable – Progress indicators (preferably quantifiable) can be identified
 - Achievable – Can be accomplished with available resources
 - Relevant – Is within the scope of the related strategic goal and is not redundant with another objective
 - Time-Bound – Time to complete can be determined and is within the timeframe of the IT strategic plan

3. Copy your objectives on sticky notes. Read them aloud and affix notes on the flipchart under the appropriate strategic goal. Group discussion assesses whether the objectives meet the SMART criteria and offer suggestions for improvement.

4. Revise objectives as desired, and post the revised copies on the flipchart for review and comment by the larger group (lightening review round).

5. Following larger group review, revise objectives as needed.