

Tool 1: Pre-Workshop Review Materials Checklist

Defining IT’s mission, vision, goals, and objectives depends on prior work analyzing the IT environment and identifying the institution’s strategic goals. Results from these efforts should be distributed at least a week ahead of time to participants in the mission/vision and IT goals/objectives workshops.

Relevant Discover phase outputs are listed below. Your institution may not have produced all of these; likewise, you may wish to include others not mentioned here (e.g., an institutional report or a sample IT strategic plan from a peer institution). Primary outputs like the institutional SWOT analysis and institutional strategic goals should be reviewed by all workshop participants. Supporting outputs need not be reviewed by everyone, but should be available in the event participants wish to query them in detail.

For more on the Discover phase processes that produce these materials, see the [IT Strategic Planning Discover Playbooks, Parts I and II](#).

Source	Review Item	Resource Type	Sent Y/N
Environmental Scan	SWOT Analysis	Primary	
	Issue and Trend Documentation	Supporting	
	Issue Impact Analysis	Supporting	
	Listening Tour Needs Compilation	Supporting	
	IT Customer Satisfaction Data	Supporting	
	Distributed IT Engagement Feedback	Supporting	
	Staff and Skills Audit	Supporting	
	IT Capabilities Assessment	Supporting	
Institutional Goals Alignment	Institutional Strategic Plan	Primary	
	List of Institutional Strategic Goals/Objectives (if not in plan)	Primary	
	IT Activity Categories	Primary	
Other	List of IT Activities (identified during strategic goals cascade)	Supporting	
	<i>List other desired review items here</i>		