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**Itana Face2Face 2019**  
**New to EA: re/Launching your Enterprise Architecture Practice**  
Full Day Workshop

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**EDUCAUSE Annual Conference 2019**  
Monday, October 30, 8a-4p CST  
Chicago, Illinois

**Chris Eagle**

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Steering Group Member, Itana*

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New2EA WG Chair, Itana*



*A Professional Group of Enterprise, Business and Technical  
Architects in Higher Education  
<http://itana.org>*



*What did you like about the meeting?  
What went well?*



*What should we have done differently?  
What didn't work for you?*



*What big ideas did you get today?  
What are you definitely going to take back?*

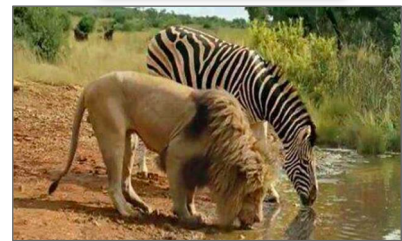


*What questions do you still have?  
What do you want to go and learn more about?*



## Scenario A: Saving Money at the Zoo

“I have a great idea. We can combine two habitats into one, make it twice as big and allow the animals more room to roam. The lions and zebras are already next to each other, we just have to pull down the fence separating them! Here’s the analysis of the cost savings to the zoo.”



How do you respond?



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## Scenario B: Best of Breed Car

“We need a new vehicle. I’m tired of always buying an off-the-shelf model with some good points and some bad ones. This time I want to pick the best of each component and make the perfect transport.”

How do you respond?



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# Scoping Your EA Practice - Strategy-on-a-Page

See the *Itana Wiki* for more information: <https://spaces.at.internet2.edu/display/itana/Strategy+on+a+Page>

## Description:

A Strategy on a Page is a single-page summary of an organization's current strategy. It is intended to be easy to create, share, consume, and update.

## Goals:

- Make it easy for teams to have a meaningful strategy discussion without a lengthy or complex document
- Make it easy to share and consume strategy across an organization
- Make it easy to update strategy as things change

## Components:

### Vision:

A brief description of the future that is envisioned as a result of this strategy. This helps provide an overarching "story" more general than the outcomes stated.

### Strategy statement:

A summary statement of the strategy, for example in the form: "To enable (who?) to (do what?), we provide (what?)." If the group has an existing brief mission statement, that could be a placeholder. It is ok to write this statement after drafting the items below and getting everyone's ideas out.

### Drivers:

Summarize what changes or factors in the environment are driving the strategy. For example: changing business needs; changing resource constraints; growing demand; new technology opportunities; need to address technical debt; ongoing operational demands; etc.

Initiatives: What will be done in response to the Drivers to achieve the Outcomes. Typically these are projects, though other work could be included. It may be helpful to categorize these items as Current, Proposed, or Future.

### Outcomes:

Summarize what is intended to result. If possible these should be business outcomes rather than technology changes. For example, "System upgraded to V2.5" is less helpful than "Faculty sharing syllabi across the curriculum using new LMS functionality." The closer the outcome can be to a SMART goal, the better, but it is normal for teams documenting a strategy for the first time to keep outcomes more general.

## Communication

Improved communication is one of the fundamental goals of this method. Once they are drafted strategies should be kept where they are readily available to team members, peer teams, and stakeholders such as customers, sponsors, or investors. Not only should the document be available, it should be actively shared and referred to in team meetings, planning meetings, project reviews, customer advisory boards, etc.

## Documenting Scope

When you are ready -- after some period of open-ended exploration and perhaps initial demonstration of value -- it is helpful to document the scope of the EA practice. This makes it possible to:

- > Further clarify scope with stakeholders
- > Widely communicate the mission of the EA practice
- > Gain feedback and buy-in

A good way to record scope is in the form of a summary **strategy** for the EA practice. A simple one-pager helps your own team and others understand why the EA practice exists, what is driving its work, and the outcomes it is working toward.

There are many ways to capture strategy; here is a simple “strategy on a page” template:

<b>Strategy statement:</b> To enable ___ to ___, we provide ___.		
<b>Vision:</b> <i>What is the future you envision as the result of your strategy?</i>		
<b>Drivers</b>	<b>Initiatives</b>	<b>Outcomes</b>
<i>What major factors in the environment drive and focus our work?</i>	<i>What are you doing in response to your drivers to reach desired outcomes?</i>	<i>What will be different as a result of your strategy? What business value will result?</i>



## Example: Strategy on a Page

The sample strategy on a page at right summarizes scope for an imaginary EA practice:

- > **Why:** This practice is going to increase the effectiveness of the university’s IT spend (see blue highlights at right)
- > **What:** This practice is focused on IT infrastructure and services (see green highlights at right)
- > **Where:** This practice is going to deliver outcomes in central IT and with central administration (see orange highlights at right)
- > **How:** This practice is going to do certain work such as systems analysis and business capability mapping (see purple highlights at right)

Having determined this scope, the EA practice can now review its ability to, for example, engage with stakeholders in the identified organizations, or create the stated deliverables.

<b>Strategy statement:</b> To enable the university to make best use of its IT spend, we work to rationalize IT infrastructure and align IT services with business needs.		
<b>Vision:</b> Sustainable, highly optimized IT infrastructure supports IT services that directly enable the university’s strategy.		
<b>Drivers</b>	<b>Initiatives</b>	<b>Outcomes</b>
IT budget cuts drive need to reduce costs by eliminating redundant platforms.	Work with service teams in central IT to analyze platforms and roadmap EOL for redundant platforms	Central IT applications consolidated from X to Y platforms, resulting in Z cost savings.
IT governance needs better ways to understand IT services for investment decision-making.	Work with business units in central administration to define business capabilities	All applicable IT services mapped to administrative business capabilities, enabling those units to participate better in IT governance.





My Strategy-on-a-Page / Institution: \_\_\_\_\_

**Strategy Statement:** (To enable \_\_\_ to \_\_\_, we provide \_\_\_.)

**Vision Statement:** (What is the future you envision as the result of your strategy?)

Driver	Initiative	Outcome

# Maturity Model on a Page

	Level 1 <b>Initiating</b> <i>(Identify)</i>	Level 2 <b>Formed</b> <i>(Validate)</i>	Level 3 <b>Defined</b> <i>(Repeat)</i>	Level 4 <b>Managed</b> <i>(Change)</i>	Level 5 <b>Improving</b> <i>(Future)</i>
Attribute A <a href="#">Scope Definition</a>	The initial scope consists of identified opportunities with potential to realize the value proposition.	The initial scope is validated through key engagements and optimized to best realize the value proposition.	The scope is clearly defined, and the value proposition widely understood.	The scope is regularly evaluated and processes to implement changes are in place.	Investment is regularly made in validating new opportunities to expand scope.
Attribute B <a href="#">Engagement</a>	Key stakeholders, ready to explore and support EA capabilities, are identified and relationships with them are established.	Engagements strengthen existing stakeholder relationships and form new professional relationships.	Key stakeholders value and advance EA within the organization. A network of professionals engaged in EA activities forms.	EA practitioners are welcomed and integral to the processes of stakeholder organizations.	The EA practice is a trusted business partner to its key stakeholders.
Attribute C <a href="#">Impact Assessment</a>	The organizational context is assessed and potential measures of the value proposition are identified.	Outcomes of key engagements are measured against the value proposition using qualitative assessment methods.	Outcomes are measured against the value proposition using established assessment methods and defined metrics.	Cost benefit is optimized using assessment data and operational costs.	New and alternative measures are explored, evaluated and adopted to improve assessment accuracy.
Attribute D <a href="#">Delivery</a>	Potential methods are identified to deliver the value proposition within the defined scope.	Delivery methods are validated through key engagements and refined to improve outcomes.	Delivery methods are well defined and expected outcomes repeatable.	Delivery methods are regularly evaluated, and processes are in place to implement improvements.	New and alternative delivery methods are explored and evaluated.
Attribute E <a href="#">Management</a>	The vision, business case and initial organizational structure for the EA practice is identified.	The EA capability is approved by the organization. EA resources are identified and charged. Progress towards the value proposition is tracked and reported to stakeholders.	The EA program has a clear and measured value proposition. Proper financial and staffing resources are available. The program is embedded within the organizational structure of the organization.	The EA practice has processes in place to regularly evaluate its value proposition and to adjust to opportunities and constraints.	The EA practice engages in strategic thinking and long-term planning.

## Future of Higher Education: Summary of Drivers & Responses

SUMMARY

Digital Transformation (DX)	Shifting Skills	Employment & Income Challenges	Higher Ed Financial Crisis
<p><i>Drivers (DX)</i></p> <ul style="list-style-type: none"> <li>• New technologies that impact all aspects of society</li> <li>• Unknown "winners and losers"</li> </ul>	<p><i>Drivers (Workforce)</i></p> <ul style="list-style-type: none"> <li>• New classes of jobs, skills, and competencies</li> <li>• Shifting emphasis on "above the line" competencies</li> </ul>	<p><i>Drivers</i></p> <ul style="list-style-type: none"> <li>• Increasing numbers of existing jobs displaced</li> <li>• Rising tuition, while many students &amp; households are financially challenged</li> </ul>	<p><i>Drivers</i></p> <ul style="list-style-type: none"> <li>• Growing number of institutions closing or merging</li> <li>• Many institutions likely to enter bankruptcy</li> </ul>
<p><i>Suggested Responses</i></p> <ul style="list-style-type: none"> <li>• Build adaptability into your organization.</li> <li>• Educate leadership and campus about the DX Story</li> <li>• Create a futurology practice</li> <li>• Build a DX Change Management Office or Practice to engage all of campus in the DX change</li> <li>• Develop pedagogy and content for to help students understand the DX</li> </ul>	<p><i>Suggested Responses</i></p> <ul style="list-style-type: none"> <li>• Create a strategic investment fund for reskilling our workforce</li> <li>• Build a Strategic Workforce Development Center that focuses on continuous development</li> <li>• Create a continuous learning and improvement culture among all staff</li> <li>• Actively manage Human Resource debt</li> </ul>	<p><i>Suggested Responses</i></p> <ul style="list-style-type: none"> <li>• Create more graceful entry and exit points for students / lifelong learners</li> <li>• Leverage DX technologies to make sure the student receives the best, most efficient experience</li> <li>• Drive down administrative costs through automation, autonomous systems, etc.</li> <li>• Look for partnerships to offset student tuition</li> </ul>	<p><i>Suggested Responses</i></p> <ul style="list-style-type: none"> <li>• Look for merger opportunities to build footprint, brand or find efficiencies</li> <li>• Build up endowments / reserves to buffer against continued financial risks</li> <li>• Find alternate funding sources (partnerships) to offset tuition and lost government revenue</li> <li>• Eliminate or collapse departments</li> </ul>

INFORMATION TECHNOLOGY  
UNIVERSITY of WASHINGTON  
Enterprise Architecture & Strategy

Summarized from: Jim Phelps, Future of Higher Education - Our Response to Disruption  
EDUCAUSE Annual 2018



## Future Higher Education Institution

SUMMARY

Data Driven Foremost	Digital Experience is Central	Automation for student experience	Lifelong learners, working learners are common
<ul style="list-style-type: none"> <li>• Need to automate to drive efficiencies</li> <li>• Measure effectiveness of experience</li> <li>• Measure outcomes</li> <li>• Drive hyper-personalization</li> </ul>	<ul style="list-style-type: none"> <li>• Multiple experience designs support diverse learners</li> <li>• Hyper-personalization is the norm</li> </ul>	<ul style="list-style-type: none"> <li>• Automation matches students to courses, peer groups, co-curricular activities, advisors and mentors, supporting services like transportation, food, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Multimodal education supports lifelong learners, when and where they learn</li> <li>• Multiple graceful entry/exit points deliver learning achievements from microcredentials to degrees</li> </ul>
<p><b>Automate Everything</b></p> <ul style="list-style-type: none"> <li>• Match researchers to grants &amp; pre-populate applications</li> <li>• Match student applicants with best fit and experience</li> <li>• Drive efficiencies in facilities and administrative tasks</li> </ul>	<p><b>Workforce Development is strategic</b></p> <ul style="list-style-type: none"> <li>• Constant workforce development focused on reskilling and realigning roles</li> <li>• Matrixed organization is focused on the digital experience</li> </ul>	<p><b>Innovation and Reinvention are core</b></p> <ul style="list-style-type: none"> <li>• Constant feedback and measure drives innovation and reinvention of the experience and drives efficiency</li> <li>• New technologies and changes in society require innovation and reinvention to be core to the culture</li> </ul>	<p><b>Mergers and Partnerships extend the experience</b></p> <ul style="list-style-type: none"> <li>• Learners can attend a partner campus close to work/home</li> <li>• 3rd party partners extend the experience to transport, housing, food, etc.</li> </ul>

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# My 1-Year Action Plan

2019-10-14

In order to keep myself accountable I will share this roadmap with \_\_\_\_\_ now, and review it with them in December 2019 and June 2020.

<b>EA Drivers</b> <i>Jot down your EA drivers, both organizational and digital transformation, from your scope document.</i>	<b>EA Initiatives</b> <i>Jot down your EA initiatives from your scope document.</i>
<b>Skills</b> <i>Jot down the additional skills you will need to develop.</i>	<b>Relationships</b> <i>Jot down the key relationships you will need to develop.</i>

**My 1-Year Action Plan**

*Jot down the actions you will take to reach your goals.*

**October through December**

**January through June**

**Challenges & Obstacles**

*Jot down the challenges or obstacles that could make the above difficult.*

**Possible Responses**

*Jot down your plan for responding to each of these challenges or obstacles.*

