

## Announcements:

- Join the Itana Mentoring Circle - <https://mentoring.educause.edu>
- Ashish Pandit is joining the Itana Steering Committee
- Betsy Draper is retiring from KSU - congratulations Betsy.

## Overview of the topic:

You need to be able to practice EA without calling it EA. We will show you three different case studies from UMichigan, KSU and UW.

### Betsy Draper (KSU):

Background: Leadership Change with little interest in EA practice. They have started to distribute EA out to groups inside Central IT.

Case Study: Poking the Policy Bear.

- Nobody wants to do it, or own it but everyone wants it to exist.
- Looked for who might own this work. There is an IT Leadership group (one IT) that worked on a U wide IT Strategic plan. Saw the policy as a way to pull the group back together.
- Did research of peers. Got buy in from CIO and Deputy CIOs and got buy in from the University Counsel.
- Focused on the Consulting of RACI - focused on the Why aspect of the policies. Standards and procedures had been morphed into policies which made them hard to manage.



### RACI\* Roles

	IT Comm Team	SME	Stakeholders	One IT Team	Legal	CIO
Draft policy	AR	C	C	R	R	I
Final Draft	R	I	I	AR		I
Final Policy	R	I	I	R	R	A

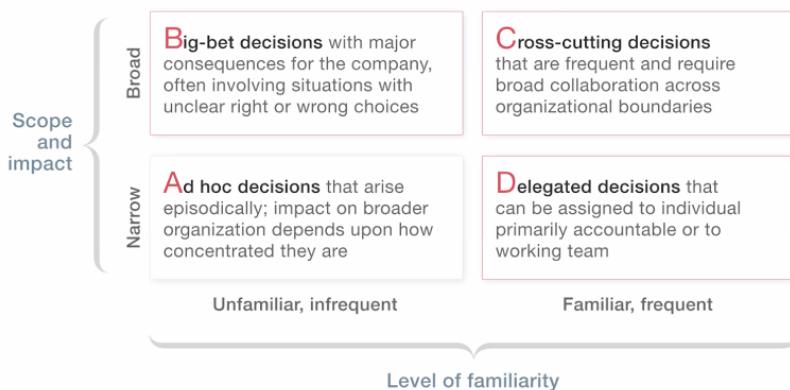
- \*RACI – Responsible, Accountable, Consulted, Informed
- Interesting that their RACI is based on the state of the Policy (Draft, Final Draft, Final Policy)
- Process slide describes how they went through.
- Results: 16 policies under review, 2 updated and approved, 1 retired. Pulled out the Standards, procedures, guidelines and pushed them to the compliance
- This was an opportunity to get the EA long-view into the policy effort.
- Experience the Turkey Call Syndrom - if you ever go to Cabella's and someone picks up a turkey call, people will gather and start playing with Turkey Calls.
- Architecture Skills that you used:

- The longview / strategic thinking
- Selling the idea - putting structure around the idea so that it is sustainable
- Measuring and Communicating success.
- Building a following, inspiring action was also important.
- One driver was an IT Audit that dinged them on the date/state of policies.

### Chris Eagle (UMich) - Stealth EA at UMich

- Had an active EA practice, dismantled by the new CIO - nor an appetite to create one
- EA is managed through centralizing the portfolio (used to have 15 ticketing systems, collapsed to one)
- This works for big centralized services but not the non-centralized tech & initiatives.
- Can we identify small effort initiatives that happen in the units that could be centralized
- 
- Used the ABCSs of decisions from McKinsey.

The **ABCDs** of categorizing decisions.



McKinsey&Company



- Came up with a metaphor of red apples.
- Shopping for red apples metaphor: Anyone shopping would go to the store and pick 5 of the reddest apples. At a university, you would dump them all out and start to sort them from reddest to least red. Then start arguing over apples 14 and 15 as to which was reddest.
- Had a red apple initiatives. Brainstormed 150 potential red apples. Winnowed this down to 6 red apples. 5 of the six did get prioritized in the IT roadmap for the university. Used a Jamboard. Everyone had 3 Red Votes (This is a priority) and 3 Blue Votes (I would help with this).

## Process

### Use Campus IT Leadership (40ish people)

- Brainstorm ideas - over 150 potential red apples
- Group duplicates and remove non-Red Apples
- Vote on most important ones
- Pass results to IT Governance for prioritization

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## Six Red Apples

1. **Mass Communications Tools:** Create a matrix/tool that would help to select a proper tool, or service, to use for sending communications to students, alumni, donors, and other groups in the U-M community.
2. **SaaS Services Integration:** Create a searchable inventory of software in use at U-M.
3. **Campus Mobility:** Implement a SoftPhone solution for telephones and texting.
4. **Campus Mobility:** Create some guidelines for using technology during in-person and remote classes/meetings. Many units have already created their own documents, but cross-university guidelines will assist in consistency across U-M, including software licensing and hardware purchases.
5. **Development & Resource Training:** Create and manage a shared list of recommended professional development resources for people in the Michigan IT community.
6. **Technology DEI:** Coordinate the various laptop and software loaner programs on campus into a single program that makes both software and hardware easily accessible to students that need them.

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- Team Dynamics as a centralized business process management platform
- Architecture Skills
  - Finding a way to make it fun and get people engaged was a challenge. Finding a way to turn this into a creative and fun activity. The red apple exercise and Jamboard.

## Jacob Morris

- History of Jacob - Director of Learning Tech, HR/Payroll, EA Team, Interim Director of Org Development, then special position reporting to the CIO.
- Architecture Skills:
  - Generate ideas, using and artifact, selling and idea, inspiring action, sustaining.
  - Found these skills very helpful but didn't know as much as he thought until he started to apply them in different contexts.
- Examples:
  - Service Management Board - idea generation and getting them vote and create a strong set of recommendations for the CIO.

- Personal Data Processing Task Force - using an artifact to help define, understand and implement a new system to track privacy related data. Took artifacts that already exist and blended them into a new artifact that rolled that information up.
- UW-IT Senior Leadership Team - selling the idea on how they should work together (decision making or info sharing?). Finally figuring out how they should work together.
- Future of Work / Return to Campus - inspiring action by articulating a vision. We need the future to be different. In the past: everyone on campus, a few people watching "work TV" when remote. Now the explosion of Zoom meetings is not really what we want in the future. We need a different future not the past, not the current.

### **Jim re: Edge, Leverage, Core mentioned in chat**

Edge - things that are run by a department

Leverage - I see you 10 are running the same thing, maybe you should get together and run it more efficiently

Core - let's move this to a central unit

We need to have effective practices for moving in both directions

Edge->Leverage->Core and back. Chris' Red Apple exercise is a great example of moving Edge->Core.

### **Working Group Updates;**

BI WG - JJ DuChataue talking about his work UW-Madison

API - Report out from BYU Unconference

New2EA - Wiki Refresh is next week. Four weeks is a normal call.

Book Club - Report out in 2 Weeks

Wiki Refresh - In 4 weeks. 2 hour hands on.

### **Chat**

11:10:39 From Jacob A. Morris to Everyone:

<https://mentoring.educause.edu>

11:11:32 From Beth Schaefer to Everyone:

The mentoring circle is called "Itana - Journey Mapping"

11:22:21 From Jim Phelps (UW) to Everyone:

<https://spaces.at.internet2.edu/display/itana/Architecture+Leadership>

11:38:24 From Jim Phelps (UW) to Everyone:

There is a concept I use here of Edge - Leverage - Core that this effort puts into place in a really elegant way

11:39:52 From jeff kennedy to Everyone:

@Jim are those edge/leverage/core similar in architecture treatment and governance requirements to Gartner's "pace layers" of innovation/differentiation/record?

11:40:17 From Betsy Draper to Everyone:

@chris - Great example of "Inspiring Action, Mobilizing, and Acting" especially with the needs that came up due to COVID.

11:50:03 From Dana Miller to Everyone:

Great service to the UW, Jacob!

11:54:40 From Betsy Draper to Everyone:

This moment in time is a great opportunity to really think about what we mean by "high touch" customer contact ... which may have been more of a perception than reality pre-COVID.

11:55:09 From Dana Miller to Everyone:

+1 Betsy!

11:55:34 From Beth Schaefer to Everyone:

Great stuff today Betsy, Chris, and Jacob! Thank you!

11:56:02 From Dawn Hemminger (she/her) to Everyone:

Thank you all for sharing!

11:56:19 From Dana Miller to Everyone:

Thanks Betsy, Chris, and Jacob!

11:56:39 From Amy J Fouts to Everyone:

Also with the return to work, how do we grow and cultivate relationships now that they are happening virtually.

11:56:40 From jeff kennedy to Everyone:

That's so soon!

11:56:47 From Dana Miller to Everyone:

Congratulations Betsy!

11:56:48 From Rupert Berk, UW (he/him) to Everyone:

Thank you for the great presentations!

11:56:50 From Rupert Berk, UW (he/him) to Everyone:

Congratulations, Betsy!

11:56:50 From Henry to Everyone:

another great meeting! appreciate the discussion

11:56:56 From Amy J Fouts to Everyone:

Thanks everyone for the great presentations

11:57:07 From Beth Schaefer to Everyone:

Congratulations, Betsy!!

11:59:40 From Robert Snyder to Everyone:

Betsy, congratulations! And to your comment above, as someone whose whole career has been focused on realizing a modern online campus that is fully integrated into the University. The pandemic has put a lot more of my colleagues in the shoes I wear—advocating for digital transformation. Now that residence is the focus again, I really hope we do not lose the benefits of meeting customers in the Digital places they are.

## Attendees:

 JP Jim Phelps (UW) (Host, me)

 Betsy Draper (Co-host, Guest)

 Chris Eagle, umich (Co-host, Guest)

 Jacob A. Morris (Co-host, Guest)

 Beth Schaefer (Guest)

 Adam Caimi (Guest)

 AM Alberto Mendoza (Guest)

 AJ Amy J Fouts (Guest)

 Ashish Pandit (Guest)

 Betsy Reinitz (she/her) (Guest)

 Brian DeMeulle (he/him/his) (Guest)

 DM Dana Miller (Guest)

 Dawn Hemminger (she/her) (Guest)

 H Henry (Guest)

 jeff kennedy (Guest)

 Kathleen Ellis (Guest)

 Michael E. Davis (Guest)

 Piet Niederhausen (Guest)

 RC Rich Cropp (Penn State) (Guest)

 Rupert Berk, UW (he/him) (Guest)