2019-01-10 Call Note - Digital Transformation Panel

Agenda

1. Roll Call (by timezone - East to West)
2. Scribe Shout-out - It's easy to scribe: How To Scribe Itana Calls Guide
3. Agenda Bash
4. **Main Topic - Digital Transformation Panel**
   - Debbie Carraway, Director of IT, College of Sciences, NC State (if we want to include an IT governance focus)
   - Josie DeBaere, Director of Technology Architecture, Boston University
   - Susan Grajek, Vice President, Communities and Research, EDUCAUSE
   - Bobby Gray, Director of Digital Transformation, Arizona State University
   - John Rathje, Vice President/CIO, Kent State University
   - Dave Weil, Associate Vice President and Chief Information Officer, Ithaca College
5. Itana Org Updates (if any)
   - . Working Group Updates
       a. New2EA Working Group
       b. API Working Group

- Business Architecture Working Group

1. Steering Committee Update
   a. Women in EA Working Group

Attendees

Panel on Digital Transformation

Background reading:

- Getting Ready for Digital Transformation: Change Your Culture, Workforce, and Technology
- Digital Transformation: What Is It?
- Digital transformation signals: Are You on the Journey
- 7 Things You Should Know About Digital Transformation

Panelists:

- Debbie Carraway, Director of IT, College of Sciences, NC State
- Josie DeBaere, Director of Technology Architecture, Boston University
- Susan Grajek, Vice President, Communities and Research, EDUCAUSE
- Bobby Gray, Director of Digital Transformation, Arizona State University
- John Rathje, Vice President/CIO, Kent State University
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Themes / Key Takeaways we want members to leave with

Josie - the organization needs to retain flexibility - so you can change technology, applications and integrations, bringing in new data - bring in key partners.

Debbie - IT Governance perspective - have clear decision making processes that are not bureaucratic - make sure we are thinking about the voices we include

Dave - intentionality and holistically - looking at the workforce and culture as both inputs and part of the design

John - experience of what it is that transformation - who is it we are doing what to/for? What is the experience of the end-user experience - especially the purpose of the institution. The experience of those that we serve.

This is not just an IT effort. IT is a major voice in this but it is an enterprise wide effort.

What is rising to the surface is Organizational Change Management. We have to think differently about what can be done. The old way of thinking put us in a transactional way of acting - it is now more holistic.

What goes wrong in Digital Transformation:

John - Culturally - it is a mindshift. People see a black box that we can operate in. We can't go beyond.

Debbie - doing tech for tech's sake rather than for supporting the mission

Dave - Taking shortcuts rather than doing the holistic process - we know what we are doing, we don't have time.

Josie - not having the start-up approach. In that sense, it can be an advantage to have DX initiatives to be run by spin-off organizations. Because of the focus on customers we don't yet have, things we are not yet doing. How do you do this without threatening the existing organizations.

John - retraining and providing comfort across the enterprise.

What are you doing:

John - we are trying to raise the digital fluency of the organization that makes us (central IT) more invisible. Hiring a Chief Data Officer - recognizing that it is an enterprise pool of data.

John - governance version 2.0 / 3.0. Changing the way that data flows throughout the organization. Building a BYOA (putting guardrails around the data)

Debbie - IT Governance next generation - be intentional about being efficient and aligned with mission. Adding in Data Governance. This is about university units not IT.

Dave - we are having conversations - what is the role of Central IT as the world gets more cloudy. It is about data, the flow of data, building the guardrails.

Josie - most of the work is in Digital Learning - a micro-masters(?) on-line MBA which is targeted to have a disruptive price point and larger population.

Organization Change Management / Experience Driven Design

What would you say to your staff - to your architect? How would you coach them to behave differently?

Josie - there are threats to the current HE model. There is urgency. We need to increase our value proposition in new ways or we might not be relevant or even exist in the future.

Debbie - be part of the university. Who have you engaged with? Go to faculty meetings and listen, be engaged, ask and answer questions. Go have lunch with the students.

Dave - have meetings with staff and students that are hands-on and active to build connections. Try to be as transparent as possible about the challenges that we see. Getting up and out.

Are you taking different kinds of risks, prioritizing efforts differently, take more risks?

Josie - we are doing more risky things as pilots, etc to see what we can learn

John - We are listening to campus then trying to get ahead. What if we could do this is 2 weeks - would that have an impact. Moving from order-taker like McDonalds to something more like Farm2Table.

This is a shift - many people have been expected to minimize risk and build stability, you are now talking about change, experimentation, and engagement. This is a challenge for staff.

New skills (like Critical Thinking) -

John - Critical Thinking - When do we jump in.

Debbie - fear of failure and fear of taking risks. Part of that is the org making it safe and part is them being comfortable. This speaks to emotional intelligence.

Josie - The offices don't want to change and fail - similar to our staff.

FINAL QUESTION LIST

What are you doing around Digital Transformation

- Is Dx just another name for strategic and innovative projects?
- What is your "30-second elevator pitch" for what Digital Transformation is in higher education and why or why not it is important to the future of your institution?
- Josie - Early in process,doing some pilots, and realized need for a group to lead/own. Key is that this is targeted to increase value proposition for students (e.g. less expensive, more convenient)
- John - Doubling down on people, process, data to better align then for holistic problem solving and processes to move more nimbly
- Bobby - Looking holistically on how we engage people in a digital manner, working from the customer experience back to the organization
- Dave - Create a position to look at this to look at this from both the physical and virtual world perspective and how they connect. Trying to reimaging role of central IT and what are the implications of this (e.g. competencies) to see how this enables digital transformation
- Debbie - Looking at what does inter-institutional collaboration looks like
- Susan - Helping HE understand what DX is, what is means, what resources our field needs to engage in it and how it differs from must IT innovation (EDUCAUSE site www.educause.edu/dx)

How people feel about the relative urgency and the timeline for this work? What pace of change at what scale when?

- John - Urgency is now if we are able to do when our various customers/partners expect. It is continually modernization rather than some sort of plateau you reach.
- Bobby - There is no play book on how to do this. Now is the time to take those risks because there are great rewards for figuring this out for HE.
- Josie - Likens this to where Kodak was - can't use the same techniques that we have always been using. Meaning we to need accept fact that this is occurring and start thinking about this now before it is too late.
- Dave - Really need to look at culture and workforce in addition to technology to make those needed transformations.
- Debbie - Institutional culture needs to change, it just isn't an IT change. Example of Senegal looking to make engineering degree completely online via mobile.
- Susan - This isn't just an IT thing, it is something that can help with "business" problems campus leadership is trying to address. Per Gartner, we should think of it as a series of multi-year initiatives.

Many people have been expected to minimize risk and build stability, you are now talking about change, experimentation, and engagement. This is a challenge for staff.

What would you say to your staff to help them through this change? - to your architect?

- Debbie - Combo of willingness of org willing to accept that things don't always work out and need to be willing to take risks, along with emotional intelligences to be take that risk.
- Josie - stop acting like oak trees and start acting like palm trees (flexible, be agile, broaden way I think). Fast learners, people that are interested in new things
- John - Taking intentional strides to create a hacker culture - value compasses over maps. Failing fast and working thru issues is a way to add value to the org
- Bobby - Provide an environment where that risk and innovative mentality is viewed as a value to the org
- Dave - Stronger connections between all of staff and students (e.g. joint mtgs between all staff and all student employees), rethinking adjacencies of staff offices, holding vacancies open while they think what is needed for the future (use temp/contractor to fill gaps in the meantime if not clear)
- Susan - DX has implications for HR that has to be addressed, such as talent mgmt. How do we make HE a great place for people to come and to build a career to help people avoid being stuck in ruts.
- Jim - Well known,, forward looking businesses in Seattle area have Chief People Officer who look at these issues and stay ahead of it.

What do User Experience / Customer Experience at the forefront mean to staff?

- Bobby - Large growth in our UI/UX dept. Grown to 10x FTE. Real emphasis on UI/UX for most initiatives, engaging directly with students at the forefront.
- Jim - How does buy/build impact that?
- Bobby - We are becoming more of a build shop with cloud shops, then integrating, and finding that is serving them better
- Debbie - Gov'n representation is moving toward those with experience and can speak to the mission and the impacts of decisions.
- John - Developed LEAN process team that is able to ask questions to drive outcomes people are looking for. This is driving IT from reactive to proactive. Having a common understanding of the approach you want to take adds value to the experience.
- Josie - Trying to transform to an institution that looks outward to the ultimate customer (e.g. student instead of the admin in the offices)

Who is facilitating the drive for DX?

- Dave - The need is bubbling up from various business units, but we (IT) drive it a bit to understand what we need IT to support it.
- Bobby - We do not, We show the art of "the possible". We open the door for them, but the functional owner need to step thru it.
- Debbie - IT is facilitator (what is possible) and listener. Times projects come up where IT has no experience in the area and needs to listen.
- Josie - Most pilot projects are coming from community. IT help know when to take ideas and turn into something campus wide, and to help realize something from idea to a real thing.

When you visit another university, what are the elements you look for to gauge that institution's state of "Digital Transformation." What would tell you that the institution was fully Transformed?

- What do you consider to be the essential foundations for success of a digital transformation effort?
- For the foundations, which need to be fully mature at the start of the effort, and which are created or matured as part of the effort?

What goes wrong in Digital Transformation:

- John - Whether or not you have stamina to continue, and culture.
- Debbie - Lack of intentionality. If we aren't intentional and conscious on direction, outcome for this institution, we end up with lost time.
- Bobby - silos need to break down to be able to look holistically (service duplication such as multiple chatbots)
- Josie - Silos go beyond outward facing IT, includes backend and elimination unnecessary sprawl. More reusability and flexibility
- Dave - Lack of governance and nowhere to go to have the DX discussions. Taking shortcuts w/o looking at impacts can reduce transformative impact.
- John - Buying the shiny new object isn't going to work. Need to understand what are you trying to do. Want architects to look at this, esp. data, to help with this and reduce complexity and increase consistency
- Bobby - Move from project to product mgmt mindset. Have x-functionaly product teams, instead of projects, to be in more of a continually improvement mindset.
- Susan - Product mgmt opens up opportunity to look at these are problems to be solved.
- Debbie - A lot of this is around maturity so we can make good decisions and have processes we can rely upon.

When you think about resourcing, the silos mentioned before where all fighting for individual resources - how do you go about making that change towards shared experience or product?

- Bobby - It is an easier ask of leadership when you go to them with holistic initiatives instead of individual use cases.
- John - Principles around what are we trying to accomplish and have to taking time to understand how those one-offs add to the mission of the institution. Their is a messaging and relation building changes. Getting wins along the way builds confidence that you are doing good things.

What are you looking for from your architects?

- John - you mentioned you hired a Chief Architect
- Josie - you talked about build a flexible architecture with an enterprise viewpoint. We have an org made-up of 8 or 9 architects, but discussions can be hard giving existing mindsets and "ruts"
- John - Leverage investments, create harmonization between those investments so they are working together, portfolio mgmt - understand what is the mission and structure them so their is harmony and they deliver value
- Dave - Flow of data, what is already out there, where does it need to go

Closing comments?

- Dave - DX is not just an IT effort, it is a whole institution effort. A lot activity is outside IT so IT needs to be a strategic partner.
- John - Org change mgmt - help people understand their role so they know the up/downstream impact of what they do
- Bobby - Get excited about this, don't be afraid of this. Exciting time.
- Debbie - Be excited about engagement with the institution, not just the tech. Connect with non-IT part of the institution.