Information Services

2026 Strategic Plan

University of Portland

Executive Summary

Each year since the summer of 2023, the Information Services department at the University of Portland has conducted a strategic review of internal and external environmental factors that impact our ability to serve the University and advance its mission and the goals set forth in the Strategic Plan. Based on this analysis, we determine our priorities and distill them into strategic goals for the upcoming calendar year. This document captures our analysis, the goals set for 2026, and a review of our 2025 goals and our progress at completing them.

The strategic outlook for higher education in general has changed dramatically since late 2024 when the last Information Services strategic plan was written. Enrollment challenges and rising costs squeeze our budgets even as the demand rises for innovation pushes enrollment and advancement departments to broaden their capabilities. Solutions to most of these problems often include a technology component (often incorporating Artificial Intelligence in some form), and as a result, the IS department has been driven into supporting more large-scale implementations of new enterprise-scale systems than ever before, with work that spans from data integration to security and privacy reviews, user training, or configuring and distributing new equipment.

While IS staff have repeatedly shown their experience and aptitude for completing projects, it is a new challenge to face a high volume of large-scale enterprise projects over a short period of time. These projects are also high-visibility, involve mission-critical systems, and are launched on aggressive timelines.

In light of this reality, our 2026 Strategic Plan centers on the art of managing and completing enterprise-scale projects, such as the launch of new enterprise applications, migration of existing systems to new platforms or versions, or the upgrade of all desktops to a new operating system version. Our goals include completion of the enterprise-scale projects currently face us, but they also go beyond that towards improving our department-wide capacity for handling project requests, identifying requirements, managing change and communications, and delivering sustainable and usable solutions.

Review of 2025 Strategic Goals

The 2025 Strategic Plan for Information Services built on a consistent theme of Modernization across the enterprise, and many of our goals built on this theme as we sought projects that could modernize both our processes within the department and the full capabilities of the institution as it evolves to face modern challenges.

Of the 32 goals listed for the year, 16 were checked off as “complete”, with an additional 7 that had clear progress. Several were demanding enough to pull resources from other goals, and one (the selection of the Canvas LMS) upended the priorities and tasks for the Academic Technology Services team, rendering irrelevant the goals that had been set before it was known whether UP would be able to move to a new LMS. Additionally, a few projects were delayed to 2026 due to factors out of our control such as vendor issues.

This result helps guide our choices in future goal-setting rounds. Particularly in the highly chaotic current era, expectations and even major projects can change rapidly, and we need to know when to stick to our original plan and when to pivot.

Goal	Success Criteria	Status
CIO Office/Department-wide goals		
Develop and deliver artificial intelligence and other advanced technology training and programs for UP staff	Deliver one new or overhauled training program in each half of the year	**Completed.** New content delivered each term.
Streamline onboarding and offboarding processes for students and employees	Establish a standardized computer setup and a list of role-based exceptions defined by managers	**Completed**. Process is streamlined for new staff.
Conduct a skills inventory of the IS staff and identify gaps	Complete inventory and gap analysis compared to future needs	**Cancelled**. Will look for more cost-effective approaches.
Audiovisual Services		
Identify gaps in UP's AV support and build report on promising classroom technology	Complete report on technology gaps and opportunities	**Partial**. Many issues identified, but not compiled into report.
Review event charges for AV staff time and equipment	Complete review and update charges as needed	**Complete**. New pricing guidelines established.
Develop greater synergy with existing AV resources across campus	At least 2 events identified where internal resources were used in place of proposed external services	**Complete**. More events now done internally.
Client Services		
Review and optimize ServiceNow categories and assignment groups	Review and change completed, schedule set for future review	**Incomplete**. Deprioritized.
Develop streamlined interfaces for scheduling tech appointments	Integration with ServiceNow tickets completed	**Complete**. Lead times down to days from weeks.
Update standard University builds to Windows 11	Windows 11 used on all new PC deployments by fall, migration plan in place, training delivered	**Partial**. Shared machines (labs) done but individual PCs left to finish.
Develop process for identifying knowledge base documentation needs	Identify prioritization data and assign responsibilities	**Partial**. Estimated 80% complete.

Infrastructure Services and Security		
Finalize formal Incident Response Plan for cyberattacks	Complete plan and conduct at least one desktop walkthrough	**Complete**.
Pilot migration of application/environment to cloud provider	At least one successful pilot migration	**Delayed**. Planning work for 2026.
Research strategies for cost-effective hosting alternatives to VMWare	Complete documentation of alternatives	**Complete**. Pricing finalists now.
Identify voice service provider and establish migration plan	Provider selected and plan created	**Complete**. New contract signed .
Fully realize partnership with OculusIT for SOC and CISO services	Few or no incidents of false negatives by second half of year	**Complete**. No false negative events.
Launch purpose-specific security dashboards	At least three dashboards created for users within IS	**Complete**. IS team using new dashboards
Collaborate with Shiley School on technology roadmap	Complete roadmap with prioritized work/funding	**Delayed;** this is better to complete with the new Dean
Research Microsoft enterprise administrative capabilities	Recommend and plan either greater adoption of MS365 tools or an alternative	**Deprioritized** as Win 11 project took resources
Set roadmap for transitioning all remaining accounts to full MFA	Complete roadmap with timeline	**Partial**. Only alumni accounts remain.
Evaluate next steps in wireless infrastructure support	Complete roadmap with alternative timelines/price structures	**Complete**.
Banner and Integration Team		
Weigh options for improved integration and scalability	Report to CIO with recommendations based on compatibility, fit, cost, and supportability	**Delayed**. Options are changing with AI so more research needed.
Identify pathways to centralized data solutions	At least one pilot instance to try housing and reporting on data	**Partial**. Vendor has had slow progress.
Collaborate with UP business offices on digital transformation	At least three production launches of revamped/new digitalized processes	**Exceeded**. Stopped counting at 10.
Modernize approach to task duties in Banner team	Document showing redundant support for all key modules	**Partial.** Progress slowed by turnover.
Build experience with RESTful web services	One successful web service-based integration in production and list of potential integrations	**Complete**. Went beyond first to begin implementing what would have been on that list.
Web Services		

Modernize and revitalize the Pilots.UP portal	All sites at top level navigation within Pilots.UP will be updated to the new page template and look.	**Complete**.
Contribute to university-wide initiatives including web redesign	Support successful operational deployment	**Complete**. First phase of UP web launched.
Develop new tools for finding information	Demonstrate prototype of in-house AI-based or innovative tech	**Deprioritized**. Other projects more pressing.
Academic Technology Services and Innovation		
Lead committee to evaluate Learning Management platforms	Complete evaluation and vendor negotiations	**Complete**. Canvas selected and signed. (that success pushed other goals back since they should now focus on the new tech)
Generate reports on accessibility of UP course content	Deliver analyses of Canvas tools to aid in accessibility and support for faculty to use them effectively	**Delayed**.
Review and update training materials	Fully revise ATSI presence on Pilots.UP and begin updating ServiceNow Knowledge Base	**Delayed**.
Improve sustainability and operational stability	Define repository for technical documentation with at least 8 administrative procedures documented; ADDED: review and update policies for data retention.	**Delayed**. Canvas and Canvas Studio will provide more robust ways to accomplish this.

The Strategic Landscape in 2026

Our strategic goals are shaped by the broader context of the higher education and technology sectors, and while many factors in both industries have made dramatic shifts in the past year, several trends are particularly important as we set our course for the near to medium future:

1. **The rising cost of almost everything**. Post-pandemic inflation, tariffs, uncertainty, and corporate consolidation have all been factors in driving our vendor partners to increase prices on many of our existing licenses. In many cases, companies push for particularly outlandish price hikes when they think their customers are "locked in" and unable to change providers. Navigating this challenge requires the market awareness to identify alternative solutions, the nimbleness to change providers quickly in response to price pressures, and the flexibility to accept that the existing solution may not be what we're able to stay with forever.
2. **Every field is specialized, and so is its software**. Our enterprise application "ecosystem" centers on our Enterprise Resource Planning (ERP) platform, Banner, but extends to a growing number of supporting applications that handle specific functions which are underserved by Banner. This network of "bolt-on" solutions has gradually grown over the years to meet the growing demands for data-driven processes and efficient workflows beyond what Banner can handle. In 2025 and 2026, this trend continues, with the implementation of specialized budgeting software (Millennium FAST) and outsourced payroll (Paycom) joining a portfolio that covers nearly every aspect of University administration and engagement with prospects, students, and alumni. The right helper system can improve staff efficiency and yield a better user experience for the end user but requires a more disciplined and cross-trained IS team that is aware of all the data integrations and security implications that arise with a more complex network of systems.
3. **Artificial Intelligence tools are maturing.** We need to be ready to support AI-powered tools across the enterprise, meaning we need the skills and acumen to understand the value proposition of potential solutions, the data quality and integration skills to connect to solutions, and the security posture to protect our data. We will also need to continue our education efforts to make sure UP staff and faculty are aware of the potential risks and benefits of AI.
4. **Employee culture.** Attracting and retaining IT staff will always be a challenge, particularly at the salary levels UP can offer. To counterbalance this, we need to continue to be a fun and meaningful place to work, and to provide sufficient professional development opportunities. As a department, IS can find new ways to celebrate success and give employees ownership over building an environment they can thrive in.

Strategic Goals for 2026

The outlook for 2026 includes a mix of major projects and questions to investigate and improve. To accommodate this, we've evolved our strategic goal process to recognize both strategic need. Our **Strategic Goals** remain the same as previous years: measured targets with deadlines that we hope to accomplish during the year. However, in some domains, the University's needs are not yet well defined enough to inform a meaningful goal – we'd almost certainly set the wrong one if we set it now. Instead, we have defined **Strategic Questions**, with deadlines set in the first half of 2026. These questions frame a commitment to investigate a technology, a business need, or other potential project such that the team can (if appropriate) set a meaningful goal for the remainder of the year. This recognizes the fact that some of our strategic needs will only take shape with concerted and intentional investigation.

This does mean that our final report will be a *different list of goals* than the one listed here, as we identify meaningful goals for the year and additionally capture emergent goals that stem from UP strategic projects or other opportunities.

The following table details the **initial** strategic goals and questions for 2026.

Goal	Alignment with UP values	Completion criteria/timeline
CIO Office/Department-wide goals		
Goal: Design and deliver a professional development program for IS	Our community of professionals thrives when we build up our skills and deliver a better service for UP.	EOY 2026
Goal: Implement a department-wide process for staff appreciation, celebrating completed projects, and sharing thanks/kudos	To be an employer of choice, we must lift the dignity of each person and celebrate as a community.	Develop Summer 2026 to launch with 26-27 academic year
Goal: Develop and deliver new training sessions and workshops for UP staff and faculty, with a focus on effective and ethical use of generative AI tools.	We still seek the best path to engage with AI in a way that affirms human dignity and upholds ethics.	Deliver training sessions in Spring and Fall of 2026
Academic Technology Services and Innovation		
Goal: Implement the Canvas Learning Management System for all UP courses	Modern accessible course software lowers the barriers to building a community of teaching & learning.	Launch for full campus in Fall of 2026
Question: How will ATSI need to change processes/structures to provide the necessary resources to support academic technology under Canvas?	Effectively targeting ATSI's goals in a post-Canvas reality will yield a better partner supporting faculty in the University's core mission.	Define new goals by mid-year.
Audio-Visual Technology Services		
Goal: Repurpose the Digital Directory screens as general-purpose digital signage	We can better connect our community with smart digital signage.	EOY 2026
Goal: Improve internal event support capabilities to reduce need for outsourced support	Better collaboration will save funds, improve quality, and build upon success.	Regular meetings to coordinate with Events team throughout 2026; report on remaining gaps by end of 2026
Goal: Improve classroom microphones for better recording and remote teaching	Poor audio can make classroom experiences less welcoming for students or hurt our ability to do remote teaching.	Pricing proposal by July 2026.
Goal: Automate the reservation process for equipment	Basic process improvements require considering community, engagement, and how to free up time and energy for mission-focused work.	System online by EOY 2026

Goal	Alignment with UP values	Completion criteria/timeline
Client Services/Help Desk		
Goal: Launch chat support in ServiceNow for help desk	Provides an online way for our community to get help.	Launch before start of Fall '26 term.
Goal: Automation of New Hire and Termination workflows within ServiceNow	Reduce risk, save staff time, and create a more welcoming environment for new hires.	EOY 26
Goal: Migrate all remaining Windows machines to Windows 11	A required upgrade to keep UP computers reliable and secure.	EOY 26
Goal: Establish role-based standards for computer equipment	Supports onboarding improvements, standardizes purchasing, and saves time and money.	EOY 26
Goal: Reduce printing expenses for UP	Improve UP sustainability and processes.	Goal: reduce total number of printers by 25% by EOY '26.
Infrastructure and Security		
Goal: Migrate from VMWare to another hypervisor platform.	Necessary work to avoid repeated steep price increases.	Migrate away from VMWare before contract renewal in July '26.
Goal: Upgrade the UP phone system	Necessary back-end update (invisible to users) to keep phones working at best available price point.	Migrate by May 2026
Goal: Improve management of PC equipment for better deployment of applications	Allows faster response to some tech requests so staff can get the software they need.	Utilize modern tools for apps in classroom/lab builds – target for broad usage Fall '26.
Goal: Replace iGel as the native operating system on thin clients	Cost of iGel requires moving to new platform to avoid higher expenses	Migrate by April 2026

Web Team		
Goal: Reduce dependency on Liferay	Strategic project. Provides us more flexibility to leverage other software platforms and lower cost in future; may give us new capabilities to add features to Pilots.UP and mobile app in short term.	Document existing Liferay applications to generate a current and reliable list of what apps need to be maintained. Identify options and prototype a Liferay-style app on other platforms to be consumed by LIferay; EOY 2026
Goal: Standardize support and community for web/Pilots.UP content authors.	Supports Marketing/Web work; robust Intranet content serves functions displaced in web project.	EOY 2026
Goal: Support remaining phases of UP web site refresh	UP.edu is a critical nexus for our community and the web team has a central role in managing it.	Phases 2 and 3 of the rollout are scheduled to complete in 2026.
Web and Enterprise Services (Banner and Integrations Teams)		
Question: How can we better manage data integrations between enterprise systems?	Initiatives across campus require data to inform decisions and monitor progress.	By July 1, identify an integration goal for the remainder of the year.
Goal: Standardize and formalize the process for acceptance testing on Banner modules.	Banner upgrades should only go live after sufficient testing; a formalized process helps make sure that testing is adequate and consistent.	New process and online resources by EOY 2026
Goal: Set a standard intake form and process for new big projects.	Consistently identifying project goals and requirements helps us serve all partners better	EOY 2026
Goal: Establish a cross-team community of Etrieve developers who can share modules, resources, and practices	Better support UP departments with a deeper bench of developers who can support digital transformation efforts.	EOY 2026
Goal: Implement integrations using Web Service/API	Extends options for integrating enterprise data into other apps	EOY 2026- at least one integration established using an API instead of flat file.
Goal: Automate workflows and improve business processes for Banner-using departments	Work with departments to make available the range of platforms and expertise the Banner team can offer to improve internal workflows and processes.	EOY 2026 – analyze and improve processes in at least three different business offices at UP
Goal: Improve security settings in Banner to control access to sensitive student data	Work with the Registrar's office to identify higher sensitive student data and restrict access to a more appropriate subset of users.	Completion by Oct 2026

The Three-Year Strategic Environment

The IS team builds the Strategic Plan based not only on one-year forecasts of the work we should be doing, but also a three-year perspective on the direction that our environment is heading. This helps inform our goals so we can select strategic work that prepares us for future needs where possible. Looking ahead at 2026-2028, some key factors we think are most important include:

- Maybe the hardest thing to predict right now is what the public will think of artificial intelligence three years from now. But no matter what the status is of the big-name generative AI firms, artificial intelligence-powered features will increasingly become part of existing and new tools we use in all aspects of administration and academics. This will complicate security and privacy reviews, and it will be harder to evaluate the efficacy of new proposed tools since their performance may vary as AI learns from its work.
- New versions of every major AI product come out within months, and new products that didn't exist six months ago dominate discussion of the forefront of AI technology. In this landscape, UP does not have the resources nor the institutional identity to try to surf the forefront of this wave. There's a powerful strategic value to explicitly living into our values and mission and establishing our mindset of emphasizing the dignity of humanity, our engagement with our community, and our commitment to intellectual inquiry and ethics to build an institutional approach to AI that is rooted and anchored rather than getting swept up by the storm.
- The broader economic outlook is more uncertain than it has been since at least 2020, and maybe even as far back as 2008. Nonetheless it looks likely that prices will continue to rise faster than revenues. We will need to continue to find innovative ways to control costs and to re-evaluate existing systems and services to make sure we're spending wisely.
- The rise of the AI industry will be another source of great uncertainty. Physical components like memory are already seeing price pressures and that is expected to continue. Prices for cloud hosting may be pushed in numerous directions, and our existing vendor partners could themselves be pushed by new competitors and market forces. To weather the storm, we will need to increase our flexibility to avoid being locked into services or contracts that no longer provide the right value proposition.
- Our approach to accessibility in the coming years may not be dominated by fear of federal enforcement of Title II and other standards, as the current administration seems poised to slash its workforce and capability to undertake that kind of action. This is an invitation for us to focus our accessibility efforts through the lens of our own commitment to being a welcoming and accessible space for learning, both through continued emphasis on Universal Design and through rolling out new systems like Canvas that give us more robust tools for supporting accessibility efforts on campus.