Working as a Community: Launching your Own Statewide Higher Education BC/DR User Group
Working as a Community: Launching your Own Statewide Higher Education BC/DR User Group

- **Presenters**
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    Indiana Higher Education Telecommunication System (IHETS)
Agenda

- Definition
- Why start a BC/DR User Group: The commonality & benefits
- How to start your own statewide user group
- Establishing the user group program norms
- Maintaining the momentum
- Summary
So What is a User Group Anyway?

- A type of club or community of people
  - Focused upon a particular technology or discipline
  - Share common goals, challenges, and stakeholder groups
Why Start a Statewide BC/DR User Group?

Common higher education challenges

- Do more with less
- Lack BC/DR planning tools
- Institutional commitment
- Executive commitment
- Program and personnel costs
- Educational needs
- Increased accountability
- Disaster recovery site options
Why a Statewide BC/DR User Group?

Common Benefits

- Shared resources
  - Knowledge transfer
  - Personnel sharing
  - Hardware/software
  - BC/DR education
  - Best practices
  - Consortial buying power
- Shared central repository
- Co-location opportunities
- Reciprocal agreements
How To Start Your Own BC/DR User Group: First Steps

- Research & consultation
  - Statewide
  - National
- Formation of charter team
  - Organizing or brainstorming session
- Informal discussions
  - Public and private institutions
The Crucial First Meeting

- Detailed agenda
- Propose needs assessment survey
- Group goals will drive priorities
- Mission/Vision statement
- Commitment and ownership
- Create energy and enthusiasm
- Communications methodology
- Establish leadership positions
Needs Assessment Survey

- BC/DR planning tools
- Executive level support
- Institutional commitment to maintain up-to-date records
- Majority had no contractual agreement for disaster recovery services
Vision Statement

- Vision Statement — The vision of the Indiana Higher Education Business Continuity and Disaster Recovery User Group is to provide a foundation by which member institutions may attain an increased level of preparedness and the ability for a speedy recovery in the instance of a business altering event. We will accomplish our vision through meaningful collaboration.
Mission Statement

- **Mission Statement** — The mission of the Indiana Higher Education Business Continuity and Disaster Recovery User Group is to provide a vehicle by which Indiana colleges and universities may learn, collaborate, share knowledge, and access common tools and opportunities which will aid in the preparation for disasters and establish a foundation by which a timely recovery in business operations may be realized.
Communications Methodology

- Establish list serve
- Web site-central repository
- Meetings
  - Video and/or audio
  - In-person
  - Agenda
  - Minutes
Leadership Structure

- President
- VP of Public Relations and Marketing
- VP of Membership
- VP of Education
- Sergeant-at-Arms
- Secretary
Meeting Planning

- Establish meeting schedule
- Meeting types & formats
- Location rotation
- Meeting management
- Establish meeting theme & objectives
- Announce speakers & presenters
- Assignments & delegation of tasks
Political Considerations

- Senior management buy-in
  - Encourage top-down organizational communication
  - Encourage bottom-up organizational communication
  - Solicit participation at multiple levels
  - Interface with governmental organizations

- Control of the agenda
Six Month Report Card

- Provide mechanism for sharing common experiences and goals
- List serve completed
- Established leadership positions
- Membership growth
- Technology and knowledge transfer
  - Sample processes and procedures
  - Templates
  - Tools
  - Central repository
  - Web site
Marketing Your BC/DR User Group

- Focusing on Higher Education
- Using established network to disseminate identity and goals
  - Increase membership
  - Gain subject expertise relationships
  - Promote viability of user group for all sizes of institutions
- In-State vs. Out-of-State networking
  - Local, Regional, National consortiums
  - Benefits
Maintaining The Momentum

- Staying true to goals and objectives
- Survey member schools
- User group meetings
  - Scheduling
    - Meeting dates, format
  - Agenda
    - Meeting topics
      - Determining facilitator(s)
      - Establishing goals and member ownership
    - Recordkeeping
- Maintaining Progress
  - Adjustments to goals and objectives
Indiana Higher Ed Business Continuity & Disaster Recovery User Group Members
-March 2008-
Indiana Higher Ed Business Continuity
Disaster Recovery User Group Members
-June 2008-
Next Steps

- Examine available BC/DR tools
- Research co-location and reciprocal agreement possibilities
- Complete web site and repository
- Identify educational opportunities
- Set goals for 2009-10
- Expand membership
Summary

The Do’s:

- Obtain Senior Management backing
- Designate a leader and leadership team
- Group pre-formalization discussions should reach broadly
- Conduct needs assessment
- Use Mission/Vision/Charter as strategic guide
- Proactively induce contributions by all
- Communicate accountability expectations
Summary

- **The Don'ts:**
  - Try to bite off too much too soon
    - Be aggressive but realistic
  - Allow domination of agenda by small group or individuals
  - Conduct loosely managed meetings
    - Be good stewards of everyone’s time
  - Be afraid to continually assess what’s working and what’s not
Summary

- Lesson’s Learned
  - Understand industry and pace
  - Finding member interests and exploiting
  - Goal setting
  - “Eating the elephant”
  - C.A.N.I. theme
Appendix

- **Creating a User Group-Related Links:**
  - Starting a User Group – Darryl Burling
  - Start a User Group – Adobe.com
  - Start Up – A Borland Guide to Forming a User Group
  - Microsoft – The User Group Community Activity
Appendix

- Miscellaneous BC/DR Informational links:
  - Educause article on DR -
  - Computer Technology Review – article on Best Practices for Disaster Recovery Testing
  - Ten Reasons Why DR Plans Fail -
    http://searchdatamanagement.techtarget.com/tip/0,289483,sid91_gci1139923,00.html
  - Disaster Recovery Journal – www.drj.com
  - Disaster Recovery International – www.drii.org