

Office of Information Management – Update

March 15, 2007

This is an update on activities underway in the Office of Information Management (OIM) through March 15, 2007. The update includes progress on OIM's three-phase initial work plan:

1. **Discovery/Assessment:** Identify challenges and opportunities (Winter 2006-07)
2. **Organizational Design and Transition:** Build the future of how we work together (Spring 2007)
3. **Strategic Direction Roadmap:** Choose where to invest people, money, and time
 - Short-term priorities (Spring/Summer 2007)
 - Long-term priorities (Fall/Winter 2007-08)

1. Discovery/Assessment (Winter 2006/07)

We have met with more than 100 key UW stakeholders to identify challenges and opportunities for UW information systems and information management (IS/IM). We are now nearing the completion of these initial discovery/assessment meetings, although we will continue to seek feedback from key stakeholders as we move forward.

For a list of meetings already completed, please see the last section of the [OIM Emerging Themes document](#).

The following meetings are scheduled/planned:

- March 19: Research, Technology Transfer
- March 20: President's Cabinet
- March 21: Board of Deans
- March 28: Planning and Budgeting
- April 2: External Affairs
- April 5: Shared Systems Group
- April 12: Educational Assessment
- TBA: Faculty Senate Chair
- TBA: Research Advisory Board

Broad Themes

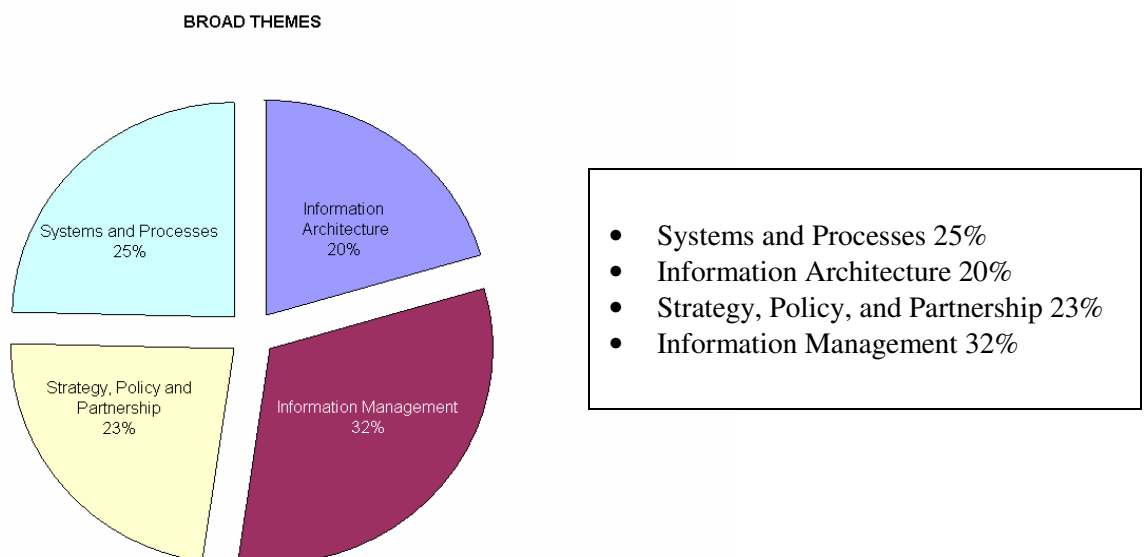
More than 500 comments have been collected from the discovery/assessment meetings, which have been organized into four broad themes. The following is an overview of the themes. For a more detailed list, please see the [OIM Emerging Themes document](#) at:

- **Strategy, Policy, and Partnership**
 - We need leadership in the IS/IM area and strategic partnerships (both corporate and higher education).
 - We need to develop an approach that provides central solutions for common needs and local solutions for specialized needs.

- We need to create a culture of open access to information and information sharing.
 - We need to leverage resources more effectively across the IS/IM community and also to recognize that additional resources will be needed to address some of the major challenges.
- **Information Management**
 - We need to provide broader, timelier data access and analytical tools.
 - We need to have consistent, accurate data.
 - We need to integrate data across subject areas and provide information that spans the lifecycle of key activities.
- **Business Processes and Information Systems**
 - Our core systems (HR/payroll, student, financial, etc.) are not meeting institutional needs
 - We need to rethink business processes as part of addressing this challenge.
- **Information Architecture**
 - We need to create a distributed development environment that provides access to common central services while also enabling local solutions for specialized needs.
 - We need to keep security as a top priority as we develop new systems and information architecture.
 - We need best practices and standards for development to ensure consistency and enable integration.

Broad Themes Analysis

We analyzed the number of comments that fell into each broad theme category to glean a sense of proportionality. The following pie chart shows the results.



Next Steps

The insights being gathered from the discovery/assessment phase will inform the Strategic Direction Roadmap, including short-term priorities for the next six-to-eighteen months. (See below).

2. Organizational Design and Transition (Spring 2007)

The organizational design phase focuses on developing a structure to facilitate communication, coordination, and collaboration across the broad community of OIM stakeholders and ensure that work is getting done efficiently and effectively.

This work kicked off with an all-day retreat January 18 with representatives from a broad spectrum of the information systems and information management (IS/IM) community. A smaller working group of retreat participants then teamed up to develop recommendations for a high-level organizational structure and design. That group made its final recommendations to Vice Provost Sara Gomez on March 15. Ideas for organizational design are also being collected from OIM staff and will be integrated into the proposed design.

Next Steps

Once all feedback has been collected, Vice Provost Sara Gomez will further refine the recommendations and complete an initial design in April for review with key stakeholders. The goal is to have a new leadership team identified by May and a new organization in place by July 1, 2007.

3. Strategic Direction Roadmap

The Strategic Direction Roadmap will propose an action plan for addressing the UW's information management and information systems challenges. The roadmap will:

- Define a vision for the future of UW IS/IM
- Identify short-term priorities (that can be addressed in six-to-eighteen months) and long-term priorities (that can be addressed over a five-year rolling period)
- Map short-term and long-term priorities to broad themes, and link them in a logical sequence to show how the vision will be achieved
- Identify trade-offs and resources required
- Drill down into specific functional areas to look at current status, desired future state, gaps, and a plan for moving forward. Areas include HR/payroll, finance/budget, facilities/space, student/course management, research development, alumni/development, transportation and purchasing/accounts payable.
- Ensure OIM's work is optimally aligned with the UW's highest priorities
- Include enterprise data management and distributed systems architecture
- Look at enterprise risk management as a way to evaluate priorities
- Cover other important issues relating to UW IS/IM

Feedback from the discovery/assessment meetings will be used to inform roadmap priorities. Preliminary work on the roadmap has begun and will accelerate in the spring.

The goal is to have short-term priorities identified by spring/summer 2007 and long-term priorities identified by fall/winter 2008, with a comprehensive roadmap completed by spring 2008.

An example of a short-term priority project that is already underway is a newly launched collaborative effort to develop a common online graduate admissions system. Partners include OIM, the Graduate School, the College of Education, and other schools and colleges.

For more information on the Strategic Roadmap, including further examples of short-and-long-term priorities, see the March 5, 2007 OIM Update presentation given to I-MAC at: <http://www.washington.edu/president/tacs/imac/meetings/2007/materials/03.05.oim.update.pdf>

I-MAC Recommendations

An important step in moving ahead on some initial priorities occurred in March, when the Information Management Advisory Committee (I-MAC) finalized its funding recommendations for IS/IM projects for FY 07-08. The final recommendations reflect feedback from the discovery/assessment meetings and the committee's earlier ranking of submitted proposals. The committee is recommending funding for seven administrative systems projects:

Group A - High I-MAC Priority / Need Central Funding: \$4,575,000

- Electronic Faculty Effort Certification and Cost Share System, Phase 2
- HR Management Information System Scoping Study
- Enterprise Data Warehouse
- Federal Financial Aid Delivery

Group B - Alumni/Development Renewal / Desire Central Funding: \$300,000

- Technology Upgrade of the Advance System

Group C - Repurpose 2005-06 Approved Proposal: \$1,510,000

- Kualu Investigation/Financial System Scoping Study

Group D - Student Systems – Deans Emerging Themes / Need Central Funding: \$179,000

- Web Grade Collection

Total central funding needed for the recommended projects: **\$6,564,000**

For more information on these projects and on other proposals submitted see:

<http://www.washington.edu/president/tacs/imac/projects/prop/2007-08/index.html>

Next Steps

The committee will now forward its recommendations to the Provost for consideration for the FY 07-08 budget cycle.

Data Management Committee

Improving information management and data access has been consistently named as a top priority in our discovery/assessment meetings and will be a major focus for short-term and long-term efforts. The Data Management Committee (DMC), led by Michael Eisenberg, dean

emeritus and professor of the Information School, is charged with addressing improvements in this area.

The committee has identified and is working on the following three short-term priorities (that can be addressed in the next six-to-eighteen months):

- **Developing common data definitions** and related business processes to ensure that institutional data coming from the data warehouse is accurate, consistent, and secure
- **Developing data management processes** to ensure university-wide standards for data administration and to create a one-stop communications portal for data access
- **Identifying the top five questions** that university leaders need to have answered, and working with the Data Warehouse and other key groups to provide that data as soon as possible

This work will also inform the DMC's long-term priorities for improving information management at the UW and will be incorporated into the Strategic Direction Roadmap.

DMC committee charge and membership can be found at:

<http://www.washington.edu/provost/oim/committee.pdf>