October 26, 2012

Service Management Board Orientation
Dear Colleagues:

Thank you for agreeing to serve on the IT Service Management Board that is being established to review and make recommendations about the provisioning, delivery and management of services provided by the UW Information Technology (UW-IT).

The IT Services Management Board is advisory to the Vice President for UW-IT and CIO and is responsible for ensuring alignment of UW-IT services with institutional IT strategy and priorities, and for optimizing the design, delivery, operation and sourcing of those services. As part of its charge, the Board reviews major UW-IT services and makes recommendations for service life-cycle improvements, including changes and enhancements to service design, delivery, and operations that will improve the value of the service to the UW community. The Board also makes recommendations for information technology service Management process improvements efforts.
Dear Colleagues:

- **ensure alignment of UW-IT services with institutional IT strategy and priorities**
- **optimize the design, delivery, operation and sourcing of services**
- **review major UW-IT services and make recommendations for service life-cycle improvements**
- **make recommendations for ITSM process improvements**

The IT Services Management Board is advisory to the Vice President for UW-IT and is responsible for ensuring alignment of UW-IT services with institutional IT strategy and priorities, and for optimizing the design, delivery, operation and sourcing of those services. The Board also makes recommendations for service life-cycle improvements, including changes and enhancements to service processes that improve the value of the services to the UW community. The Board also makes recommendations for Information technology service management process improvements efforts.
Agenda

- Welcome/Purpose
- Agenda Review/Introductions
- ITIL Concepts
- Break
- ITIL at UW-IT & the Service Life Cycle
- Break
- ITIL and Strategy
- Looking Forward/Governance
- Closing
Shifts in Thinking

- **Services versus Technology Focus**
  - *From:* Technology components
  - *To:* End-to-end service delivery in order to support specific customer outcomes

- **Customer Value Focus/Strategy Alignment**
  - Deeper customer/business knowledge needed
  - Rich collaboration between customer and IT
  - Tighter integration between University and (IT) strategy

- **Teaming/Collaboration**
  - New ways needed to support services
  - Including end-to-end teams
  - New definitions of what “teaming together” means
Group Talk

- **Services versus Technology Focus**
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Leveraging UW-IT Service Management

An overview of our journey to implement Service Management within UW-IT

- History
- UW-IT Strategy
- IT Service Catalog
- Financial Management
2006-2007
- ITIL Certs (2)
- NDT Change Mgmt.
- Service Catalog
- Service Mgmt. Team
- ITIL Overview to UW-IT Executive Team

2008-2009
- ITIL Certs (4)
- NDT Tech. & Ops. Mgmt.
- Service Catalog
- Service Mgmt. Team
- ITIL Overview to UW-IT Executive Team

2010-2011
- ITIL Certs 100+
- Service Catalog 2.0
- Service Mgmt. Oversight Group (SMOG)
- Smog Initiatives:
  - ITSM Strategy Approved
  - SMOG Initiates:
- Service Owners and Managers Named
- Improved Financial LOB/Services Alignment
- ITSM Mgmt. Portal
- Org Level Incident Mgmt. Impl.
- ITSM Knowledge Building

2012
- ITIL Certs 250+
- ITSM Tool Search Begin
- SMOG Initiates:
  - Annual Service Assessments
  - Org Level Request Fulfillment Implementation.
  - SACM Discovery Phase
- ITSM Portal Ph.2
- ITSM Governance
- Expand ITIL Training to Campus
- Governance Boards created

2013
- Governance Boards Operational
- ITSM Tool Set selected
- ITSM Tool Set implementation begins
- Change Management Implementation begins
- •
- •
Alignment with UW-IT Strategy

IT Service Management supports UW-IT Foundation and Strategic Goals, including Operational, Financial, and Staff Excellence.
UW-IT Strategy Map 2013

UW's mission: Learning, Discovery, Service

Enable faculty, staff, and students to be more effective

Foster a community of innovation

Help UW manage risks and resources

UW's business plan: Sustain, Compete, Transform

UW-IT Mission

Service Vision

Convenient and safe access to digital information and services across time, place, device and organizational boundaries

Drivers: Mobile, Global, Green, Cloud, Consumer, Safe, Simple, Open

Organizational Vision

A trusted, sought-after partner, passionate about using and improving IT to accelerate innovation, discovery, and education.

Values: Trustworthy, Responsive, Helpful, Competent, Strategic

Service Goals

Excellent infrastructure and foundation services

Improved student experience

Advanced productivity and collaboration tools

Improved global research support

Business continuity, security and privacy

Modern business and decision support systems

Organizational Goals

An exemplary organization

Strong strategic partnerships

A culture of exploration and sharing
Organization level process in place – Mature through improved integration
Phase I = 

Leads to

Phase II =
# Our Service Catalog

## Top Services for Students

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Technology Center (ATC)</td>
<td>Computer hardware and software for people with disabilities</td>
</tr>
<tr>
<td>Anti-Virus Software</td>
<td>Sophos Endpoint anti-virus software under UW central license</td>
</tr>
<tr>
<td>Catalyst Web Tools</td>
<td>Communication and collaboration applications for teaching, learning, and research</td>
</tr>
<tr>
<td>Collaboration Studios</td>
<td>Facilitate interactive, in-person project work in a shared workspace</td>
</tr>
<tr>
<td>Computer &amp; Printer Troubleshooting, Repair &amp; Moves</td>
<td>Troubleshooting, repair and moves of desktop computer hardware, software, and associate peripherals</td>
</tr>
<tr>
<td>Computing Workshops and Online Curriculum</td>
<td>Free computing workshops, Catalyst Web Tools, and Microsoft IT Academy online courses</td>
</tr>
<tr>
<td>Digital Audio Workstation</td>
<td>A digital audio recording and editing space with production hardware and software</td>
</tr>
<tr>
<td>Digital Presentation Studio</td>
<td>A private space for practicing presentations and to record sessions for later review</td>
</tr>
<tr>
<td>Email Forwarding and Filtering</td>
<td>Set up delivery options for your UW Email</td>
</tr>
<tr>
<td>Email Lists</td>
<td>With controlled access, automatically distribute and archive email to subscribers</td>
</tr>
<tr>
<td>Linux Shell Environment</td>
<td>Accounts on clustered Linux servers with a standard suite of applications</td>
</tr>
<tr>
<td>Long Distance Services</td>
<td>Long distance service</td>
</tr>
<tr>
<td>MyUW</td>
<td>Your personal portal to UW Web services</td>
</tr>
<tr>
<td>Odegaard Learning Commons</td>
<td>A large, 24-hour computer lab for the UW</td>
</tr>
<tr>
<td>Tegrity Lecture Capture</td>
<td>A cloud-based, campus-wide, lecture capture and presentation recording</td>
</tr>
<tr>
<td>UW Directories</td>
<td>Query service of contact information about faculty, staff, and students; directory assistance information line</td>
</tr>
<tr>
<td>UW Google Apps</td>
<td>A UW-branded cloud service provided by Google that includes email, calendaring, and other collaboration tools</td>
</tr>
<tr>
<td>UW NetID</td>
<td>Personal, shared (course or departmental), sponsored, and temporary identification required for access to UW online resources</td>
</tr>
<tr>
<td>UW Windows Live</td>
<td>A UW-branded cloud service which provides access to many of Microsoft’s online tools through a Microsoft Account.</td>
</tr>
<tr>
<td>UWware</td>
<td>Service to negotiate, administer, and distribute specific licensed software to the UW community</td>
</tr>
<tr>
<td>Web Publishing (for Faculty, Staff, Students, Departments, Courses)</td>
<td>A suite of Web servers for the UW community</td>
</tr>
</tbody>
</table>
Improved accounting and alignment of services and finances

Built upon work done by WTC to cost our services

Developed financial reports by service (LOB/Service)

Enabled Service Owners to understand and begin to manage costs
New Seating Arrangement Upon Return

- Betsu
- Gary
- Kate
- Roland
- Scott

- Brad
- Jean
- Mark
- Tammy
- Tom

- Barb
- Bill
- Erik
- John
- Linda

Break – 10 Minute
The Service Life Cycle Video

Table Talk

Discuss at your tables:

How could using the Service Lifecycle change the way we do business at the University of Washington? And why?
New Roles in UW-IT

New ways to collaborate means using new perspectives in how we do work. These roles support new ways of evaluating and working.

- Service Management Oversight Group (SMOG)
- Service Owners
- Service Managers
- Process Owners
Service Mgmt. Oversight Group (SMOG)

SMOG scope – an evolutionary process with the SMB

- Established to ensure that UW-IT Service Management & Planning efforts align with the larger UW-IT strategy
- Oversees the UW-IT service catalog and service portfolio
- Sets service management priorities
- Reviews and approves IT Service Management (ITSM) initiatives, tools and templates
- Reviews Annual Service Assessments (ASAs)
**Service Owner**

- Responsible for one or more services in the UW-IT Service Catalog
- Ensures that these services receive strategic attention and appropriate resources, and that the services we offer support the mission and business needs of the University
- Authority to make decisions based on customer needs, good engineering practices, strategic alignment, and financial requirements
- Service contact for SMB
Service Manager

- Understands the customer needs and represents those needs to UW-IT engineering
- Manages the end-to-end lifecycle of one or more services across multiple UW-IT divisions and units
- Ensures that services are managed reliably, efficiently, and strategically
- Ensures that services continues to support the mission and business needs of the University
- Service Managers have the authority to make tactical decisions and strategic recommendations
## SO/SM Listing resides on Portal

<table>
<thead>
<tr>
<th>Service Catalog Service Name</th>
<th>Line of Business (LOB) Description</th>
<th>Service Owner</th>
<th>Service Manager</th>
<th>ASA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACCESSIBILITY</strong></td>
<td>ACCESSIBILITY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access Technology Center (ATC)</td>
<td>Access Technology Lab (ATL)</td>
<td>Sheryl Burgstahler</td>
<td>Dan Comden</td>
<td></td>
</tr>
<tr>
<td>AccessComputing</td>
<td>DO-T</td>
<td>Sheryl Burgstahler</td>
<td>Jodi McKeeman</td>
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</tr>
<tr>
<td>ACCESSSTEM</td>
<td>DO-T</td>
<td>Sheryl Burgstahler</td>
<td>Jodi McKeeman</td>
<td></td>
</tr>
<tr>
<td>Braille &amp; Alternative Text Production</td>
<td>DO-T</td>
<td>Sheryl Burgstahler</td>
<td>Dan Comden</td>
<td></td>
</tr>
<tr>
<td>DO-IT</td>
<td>DO-T</td>
<td>Sheryl Burgstahler</td>
<td>Jodi McKeeman</td>
<td></td>
</tr>
<tr>
<td><strong>BUSINESS INFO SYSTEMS</strong></td>
<td>BUSINESS INFO SYSTEMS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admin Apps for Advancement</td>
<td>Alumni and Advancement</td>
<td>Bill Shirey</td>
<td>Brent Holterman</td>
<td></td>
</tr>
<tr>
<td>Admin Apps for Facilities</td>
<td>Facilities Services*</td>
<td>Bill Shirey</td>
<td>Brent Holterman</td>
<td></td>
</tr>
<tr>
<td>Admin Apps for Finance</td>
<td>Finance Program</td>
<td>Jeanne-Marie Isola</td>
<td>Jan Sullivan;</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Nancy Tufarolo/ASA Dev</td>
<td>ASA, FASTRANS, OASIS ASA, PGT ASA, eTravel ASA</td>
</tr>
<tr>
<td>Admin Apps for HR/Payroll</td>
<td>HR/Payroll Program</td>
<td>Lisa Yeager</td>
<td>Alin Hunter</td>
<td></td>
</tr>
<tr>
<td>Admin Apps for Student Admin</td>
<td>Student Program</td>
<td>Darcy Van Patten</td>
<td>Hugh Parker</td>
<td></td>
</tr>
<tr>
<td>Decision Support Services</td>
<td>Enterprise Information and Integration Services</td>
<td>Bill Yock</td>
<td>Anja Canfield-Budde</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*also includes LOB: Chemical Tracking System</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Process Owner

- Ensure the process is fit for purpose.

- Responsible for
  - Ongoing business value and integrity of the process design across the service, functional, and organizational boundaries the process crosses
  - Planning and implementing practices, orientation and training to ensure organizational understanding and adoption of the process activities
  - Protecting, measuring and reporting on process compliance across organizational silos
Annual Service Assessments
Transform Service Management into Strategic Asset which:

- Leverages IT to realize UW’s strategy
- Leverages the help desk to increase student/faculty/staff satisfaction
- Provides services to meet the true needs of student/faculty/staff
- Leverages technology to increase the value the UW gives back to the state
Service Strategy Objectives

- What services should we offer and to Whom?
- How do we differentiate ourselves from competing alternatives?
- How do we truly create value for our customers?
- How do we capture value for our stakeholders?
- How can we make a case for strategic investments?
New Seating Arrangement Upon Return

A
Bill
Jean
Kate
Scott
Tammy

B
Erik
Gary
John
Mark
Tom

C
Betsy
Barb
Brad
Linda
Roland

Break – 10 Minute
Table Talk

Mark each area 1 to 5 with 5 being best. Connect your dots forming a shape. Compare and discuss with your table mates.
Discussion Summary
June 27 and August 22
Discussion Outcome

- Sharing efforts between the Units
  - Campus-wide Knowledge Management
  - Continual Service Improvements
  - Integrated Service Desk concept
  - Integrated Catalog of services

- Enterprise Wide
  - Governance across local and central IT groups
  - University IT Strategy
  - Service Level Agreements
Governance Going Forward
Perspectives of Governance

Why

What

How
How are IT Services Optimized...

- Buy vrs. Build
- Who delivers what
- Lifecycle improvements
The Service Portfolio

Service Pipeline
- Continual Service Improvement
- Service Design
- Service Transition

Service Catalog
- Third Party Catalog
- Service Operations
- Retired Services
Dear Colleagues:

- ensure alignment of UW-IT services with institutional IT strategy and priorities
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- make recommendations for ITSM process improvements
Next Steps
Collaboration through Governance

IT GOVERNANCE

- President Provost
- University Budget Process
- VP for UW-IT and CIO
- IT Strategy Board
- IT Service Investment Board
- IT Service Management Board
- Chancellors
- Deans
- VPs
- Unit Administrators
- Unit IT Directors
- UW-IT Directors
- TRF Advisory

Strategic Initiatives:
1. Cloud
2. ERP
3. Student Experience
4. IT Costing
5. Research Computing (eScience)

Service Investments:
1. eProcurement
2. EDMS
3. LMS
4. HPC (Hyak)
5. Commodity Services
6. Collaboration Tools
7. Science Data Management

Service Catalog:
1. Network
2. Telecom
3. Email
4. Storage
5. Managed Servers
6. Managed Devices
• Identify campus unit IT services and costs and possible cost improvements through
  - Collaboration among units.
  - Leveraging services provided outside the unit – by a college, UW-IT, or a cloud provider.

• Studied 47 units with total of 352 IT FTE and $44.6 million in annual IT costs

• These 47 units support about 45% of the total University faculty and staff.
Enterprise-Level Recommendations

- **Create New Governance Structure** – *in order to implement the other recommendations*
- **Consolidate Servers and Storage** – *centrally or to the cloud*
- **Learning Management Tool** – *high priority due to impact to the students*
- **Strategy for End-User Devices** – *initial focus on admin users and student labs*
- **Email and Calendaring System**
- **Reduce Shadow System Support**
Unit-Level Recommendations

• **Consolidate Commodity Services** – leverage UW-IT and collaborate with other units

• **Structure End-User Support** – implement structured processes and standards

• **Use eProcurement Agreements** – for purchase of end-user systems

• **Share Personnel Resources** – for specialized services (db admin, managing collaboration environments, reporting, etc.)

• **Review Supported Applications**
Leveraging the ITIL foundations training.

Closing