AGENDA

> Call to Order
  — Welcome and introductions
  — Proposed IT Strategy Board 2015-2016 agenda

> Administrative Systems Modernization Update and Risks
  — HR/Payroll Modernization
    > IT Project Portfolio Executive Review
  — Finance Business Transformation
  — Student Modernization Cloud Strategy
  — Office of Research Information Services

> Service Management

> Technology Recharge Fee Annual Review and Recommendation

> Wrap up
## Proposed Strategy Board Agenda 2015 - 2016

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<td>February 26, 2016</td>
<td>- Network Infrastructure 20/20 Vision Update</td>
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<td>- Cloud Computing</td>
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<td>- HR/P Modernization Update</td>
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<td>May 13, 2016</td>
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Administrative Systems Modernization Update and Risks
HR/Payroll Modernization

Kelli Trosvig
Vice President, UW-IT and Chief Information Officer
Lead Executive Sponsor, HR/Payroll Modernization Program

Aubrey Fulmer
Executive Program Director
HR/P Modernization Program
IT Project Portfolio Executive Review
Finance Business Transformation

Paul Jenny
Senior Vice President, Planning & Management
Student Modernization
Cloud Strategy

Phil Reid
Associate Vice Provost, Academic Services
and Deputy Chief Information Officer, UW-IT
Kuali Student Curriculum Management (CM)

Course and Program information managed in a single source system
Status of CM Implementation as of October 2015

> Course data migrated to CM and in use to the Office of the Registrar

> Pilot programs of new course approval workflow was performed
  — All three campuses were included in pilot
  — Detailed understanding of approval workflow and committee needs was developed

> Remaining in backlog
  — Other course approvals (for example, course change)
  — Academic program (both new and change)
  — Lingering policy issues (in particular, distance learning designation)
Revised Plan
(reporting in October 2013)

2014

COURSE

Centrally Managed Course

Policy/Process Assessment

Pilot Course Workflow

Learning Objectives

2015

Centrally Managed Program

Program Requirements

Campus Program Workflow roll out

STAFF

UW IT DEPTS.

Demand on department participation increases

UW CM is THE single source

Kuali Student Curriculum Management dependencies
Emergence of KualiCo

> At the end of 2014, community-based development of Kuali Student stopped. Workflow shifted over to a commercial entity: KualiCo

> Strategy Board advised that we not partner with KualiCo, but monitor progress as we worked on academic planning (MyPlan) and CM

> KualiCo delivers CM SaaS product in September 2015

> Product evaluated in multiple demos, on-site visit by CM team, and at Kuali Days
Recommendation: Move to KualiCo Curriculum Management

> Reduced development costs
   — UWCM: ~$1.6M
   — KualiCo: ~$700K

> Reduced cost of ownership
   — UWCM: ~$400K/year in staff, plus infrastructure
   — KualiCo: ~$80K/year subscription, $100K/year in staff

> Delayed delivery of course, but faster delivery of program

> Consistent with UW-IT Software as a Service (SaaS) “cloud” strategy
Five Year Total Cost of Ownership

Cumulative Cost of Ownership

- = KualiCo
- = UWCM

Dollars

Year 1 | Year 2 | Year 3 | Year 4 | Year 5
Office of Research Information Services – MyResearch Portal Update

Mary Lidstrom
Vice Provost for Research, Office of Research
Research Roadmap Vision: Save time, reduce the research administration burden for campus, and decrease risk by creating a researcher-centric automated system that manages and streamlines research administration and compliance.
Research Roadmap

> Mission: Researcher-centric solutions
  — Single point of entry (researcher portal)
  — Single data entry
  — Interactive
    > Access information
    > Submit applications, revisions, updates, reports
    > Register for training, take online training
    > Monitor compliance functions

> Parallel processing of back office functions
Electronic Systems for Research Support: Modular Approach

CoMo
- Record of Invention Disclosure
- Research Royalty Fund

ORC
- Financial Interest Disclosure
- Outside Work Request System
- Federal Reporting Engine
- Researcher Profile (Vivo)

HSD
- HSD Office System (DORA)
- IRB Protocol Management (Zipline)

OSP
- OSP Office System (SPAERC)
- Submit and Approve Proposals (SAGE)

GCA
- GCA FA Office System (SERA)

HSA

SoM

Researcher Portal & Integrations

EXISTING

IN PROGRESS

PLANNED

RELATED

TRAINING: Registration, Reporting, Tracking
# Research Systems Project Plan for Each Module

## Step One
- Needs Assessment
  - As-is Process Mapping
  - Gaps and Improvement Opportunity
  - Function Points
  - Data Cataloging

## Step Two
- Strategy Options
  - Business Case
  - Peer Study
  - Market Study
  - Staffing Model
  - Deployment Model

## Step Three
- Scoping
  - Discovery
  - Review of Operations
  - Evaluate Procedures
  - Forms
  - Checklists
  - Scope Options

## Step Four
- Implementation
  - Technical Infrastructure
  - Business System Changes
  - Software Configuration
  - System Demonstrations
  - System Refinements

## Step Five
- Rollout
  - Communications
  - Training
  - Deploy to Unit
  - Deploy to Partners
  - Deploy to Campus
  - Conversion & Migration

## Step Six
- Steady State
  - Continual Change Program
  - Future Integrations Projects
  - Ongoing Training Programs
  - System Support
Technology Only One Part of the Solution

- Business Process
- Organizational Effectiveness/Process Improvement
- Technology/Automation
Resource Challenges

> One-time project funding: from central Research Royalty revenue
  — 6-year plan to implement the modules currently in progress

> No new resources for integration with new HR/P and Finance systems (must be reallocated from existing projects)

> No business model yet for ongoing support and maintenance

> Cost savings predicted to be minimal

  — Main time savings for faculty and their support staff to reduce burden (increase service)

  — In the central support units:

    > Allows removal of low-level positions; requires addition of project managers

    > In the long run, accommodates increased workload and enhances flexibility
QUESTIONS
Service Management

Brad Greer
Associate Vice President, Computing Infrastructure
and Chief Technology Officer, UW-IT
Service Management
UW-IT Service Management Highlights

- **2006-09**: RT Tickets; NDT Change; UW-IT Service Catalog v1
- **2009-12**: Service Owners defined; Service Assessments; Governance
- **2013**: ServiceNow contract; BAA; Process Owners defined; Change Process; Distributed IT pilot; User Survey; Advisory; Tuning project; Net+ contract
- **2014**: UW Connect (ServiceNow) launch; Incident, Problem, Request, Knowledge; MyRequests; OnCall Rotation; Customer Surveys; basic Metrics; ITSM Communities of Practice; Agile dev
- **2015**: HR/P Operations
- **2016**: Enterprise level product selection process
Visibility for Customer

SaaS, Upgrades Built-In, Self-Service
Example 1 – Request Process Handling

January 2015

November 2015
Example 2 – Classroom Requests

Technical Services Records of Incidents/Requests

- Data projection/cable issues
- Other, inc. DVD/VHS issues, Portable Projection carts, ALC
- Audio issues
- Overhead Projectors
- Installed Computer/laptop
- Unclassified issues

- Autumn 2011 and Winter 2012
- Autumn 2014 and Winter 2015
Example 3 – UW NetID Password Reset
Summary of Benefits

> Multi-level transparency

> Data improves processes

> Enterprise usage provides:
  — Reduced workflow friction – faster automation
  — Common definitions – improved collaboration
  — Common processes – reduced risk and cost
QUESTIONS
Technology Recharge Fee Review and Recommendation

Bill Ferris
Chief Financial Officer, UW-IT
UW-IT Funding – FY 2016

$114M
UW-IT Operating Budget

Self Sustaining
23%

IM & University Supported
32%

Central Funding
27%

Basic Services
45%

$51M
Basic Services

TRF Funding
18%
Technology Recharge Fee Advisory Committee

> Committee is comprised of senior administrators from academic departments, administrative units and the medical centers

> Recommendation to the Service Investment Board:
  — Maintain fundamental cost allocation methodology used for prior TRF
  — UW-IT FY 2016 budget as base
    > Use of UW-IT Fund Balance (Carryover) - $2.5M
  — Request ~1% increase in TRF
  — Partnership with IT Service Investment Board to review services via capability mapping
IT Service Investment Board (SIB)

> Concurred with the TRF Advisory Committee recommendation

> Forwarding recommendation to the Provost for approval

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<th>TRF Monthly Rate</th>
<th>FY16</th>
<th>FY17</th>
<th>$  Increase</th>
<th>% Increase</th>
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<tr>
<td>Med Center Employee*</td>
<td>$50.91</td>
<td>$51.34</td>
<td>$0.43</td>
<td>0.8%</td>
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<tr>
<td>Admin/Academic Employee**</td>
<td>$55.51</td>
<td>$56.13</td>
<td>$0.62</td>
<td>1.1%</td>
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* Excluded from GOF/DOF subsidy, Network & Telecom billed separately
** Supplements existing GOF/DOF resources to provide Basic Services
Capability Mapping with the IT Service Management Board (SMB)

Capability mapping has the potential to:

— Create common language for business teams and IT teams to communicate priorities

— Provide a way to agree on desired business outcomes rather than discussing specific technology products

— Put business leaders in control of the conversation about the need for more or different technology services
Capability Mapping with the IT Service Management Board (SMB)

> Establish a framework for consensus about *foundational capabilities* to be included in the TRF “Basic Services Bundle”

> Reflect the current TRF “Basic Bundle” through the lens of foundational capabilities
  — What is there
  — What is not there
  — What needs to evolve

> Make recommendations to the TRF committee (and eventually the SIB) around service investment
QUESTIONS
QUESTIONS AND DISCUSSION