Agenda

▪ UW IT Strategic Plan (draft)
▪ Technology Recharge Fee Update
▪ FY 2015 Investment Opportunities
▪ Project Portfolio Prioritization Update
▪ Sunset Services Recommendation
▪ Server Consolidation
▪ Wrap Up
UW-IT Strategic Plan (draft)
UW-IT Strategic Overview

Vision
- Convenient and safe access to information and services across time, place, device and organizational boundaries
- Enable students, faculty and staff to be more effective
- Help UW manage risks and resources
- Encourage innovation and competitiveness
- Be a trusted, sought-after partner, passionate about using IT to improve the UW
- Operate an exemplary organization, known for excellence, efficiency, and integrity
- Develop strong strategic partnerships
- Foster a culture of exploration, sharing, and data-driven results
- Listen, anticipate, communicate, execute

Foundation
- Cloud, Collaboration, Consumerization, Mobility, Personalization, Big Data

Mission
- Enable students, faculty and staff to be more effective
- Help UW manage risks and resources
- Encourage innovation and competitiveness

Drivers
- Cloud, Collaboration, Consumerization, Mobility, Personalization, Big Data

Strategic Goals
- Provide Superior Infrastructure & Tools
- Support World Class Research
- Enable Innovative Teaching
- Modernize Information & Business Systems
- Promote Security and Business Continuity
- Deliver Effective Services With Cost Transparency
- Technology Business Management
- Customer Satisfaction
- Governance & Decision Making
- Engagement

Assessments & Outcomes
Timeline for Administrative Application Assumptions

➢ One major system at a time
➢ Incremental innovation are a priority, especially in student facing systems
➢ Investments in business process redesign will lead to better outcomes
➢ Momentum and expertise from system replacements should be leveraged
➢ Better information now for decision making is critical
## Administrative Systems Replacement

### FY 13 - FY 20

<table>
<thead>
<tr>
<th>Category</th>
<th>Fiscal Year</th>
<th>Activities</th>
</tr>
</thead>
</table>
| **HR/Payroll**     | FY 13 - FY 18 | - Business process redesign  
- Replace legacy systems  
- Additional functionality |
| **Finance**        | FY 13 - FY 20 | - Procure to Pay  
- HR/P - finance intersections  
- Options analysis  
- Business process redesign  
- Replace legacy systems  
- Additional functionality |
| **Student**        | FY 13 - FY 20 | - MyPlan / Student self svc  
- Curriculum Management  
- Scoping & tech feasibility  
- Business process redesign  
- Student - finance intersections  
- Replace legacy systems |
| **Enterprise Info Mgmt** | FY 13 - FY 20 | - EDMS proof of concept  
- Enterprise integration  
- EDW / BI build-out |

- **Significant implementation effort**
- **Incremental modernization**

(Oct 2013)

(ongoing maintenance and production support not represented)
Portfolio Review Board (bi-weekly) – Managed resources, assure projects are on track

IT Service Management Board (monthly) – Make recommendations for service improvements and discontinuation of service

IT Service Investment Board (SIB) (monthly) – Project priorities, budget requests, TRF

IT Strategy Board (3 times per year) – Policy, strategy, major IT investment, review
Technology Recharge Fee Update
TRF Review: Progress to Date

- Successful audit of the TRF rate process by UW Internal Audit in Spring 2013
- Annual review and analysis by the Technology Recharge Fee Advisory Committee in October
- Recommendation to the Service Investment Board today
TRF Rate for FY 2015
Cost Model Assumptions

▪ Maintain methodology approved by Service Investment Board for FY14 & FY15
▪ Use UW-IT FY 2014 budget as base
▪ Maintain FY 2014 TRF funding level
  – Use UW-IT Fund Balance to cover increase in expenditures - $2.9M
▪ New investments from Provost are not included in calculations
UW-IT FY14 Budget

$109M Total UW-IT Budget

- Self Sustaining $25.2M
- Basic Services, $50.1M
- Information Management $22.1M
- Student Tech Fee $2.2M
- University Supported $3.9M
- Classroom, Technology, & Events, $6M

$50M Basic Services

- Basic Services - Central $31.2M
- Basic Services - TRF $18.9M
TRF Rate for FY 2015

- TRF Committee recommendation is to maintain current TRF Rates (no change)*:

<table>
<thead>
<tr>
<th></th>
<th>FY 14</th>
<th>FY 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Rate</td>
<td>$54.50 mo</td>
<td>$54.50 mo</td>
</tr>
<tr>
<td>Medical Center Rate</td>
<td>$50.00 mo</td>
<td>$50.00 mo</td>
</tr>
</tbody>
</table>

*TRF rate calculation resulted in an immaterial rate change. Committee recommended maintaining existing rates.
Looking Ahead

- Explore major changes to TRF for FY16:
  - Move to more transparent and simpler allocation methodology
  - Align with current UW-IT organization and services
  - Review treatment of Information Management and Classroom Technology & Events (new to UW-IT)
  - Review treatment of students
  - Review allocation of GOF/DOF

- Begin in Winter/Spring 2014
FY 2015 Investment Opportunities
Should we include in the TRF?

- **40G Campus Network Upgrade**
  - *Increase the campus backbone network capacity to support big data research*

- **Undergraduate Admissions Modernization**
  - *Transition the paper-intensive admissions review to an online process*
## Impact of New Investments on TRF

<table>
<thead>
<tr>
<th></th>
<th>FY 15</th>
<th>40 GB</th>
<th>UGA</th>
<th>Both</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus</td>
<td>$54.50</td>
<td>$56.68</td>
<td>$56.98</td>
<td>$59.26</td>
</tr>
<tr>
<td>Med Ctrs*</td>
<td>$50.00</td>
<td>$50.00</td>
<td>$50.00</td>
<td>$50.00</td>
</tr>
</tbody>
</table>

*Medical Centers are covered by separate networking agreement, and not impacted by 40 GB network. Medical Centers do not contribute to Information Management efforts.*
Information Item: Included in UW-IT Provost Request FY 2015

- 40G Campus Network Upgrade
- Undergraduate Admissions Modernization
- MY Husky Experience
  - A technology ecosystem that promotes student engagement in co-curricular learning experiences across campus
- UW Academic Explorer
  - Following MyPlan, additional academic planning tools
UW-IT Portfolio Ranking Process
Follow Up
UW-IT Portfolio Ranking Process

Outcomes

▪ Use ranking process priorities to guide UW-IT project resource allocations when conflicts arise
▪ Hold next phase of eFECS project*
  – Scope a more limited project to deliver functionality not provided by future replacement systems
▪ Hold next phase of MyFD project*
▪ Seek funding for top two SIB priorities: 40G Network and Undergraduate Modernization

*Projects have maintenance-level funding
Sunset Services Recommendation

- Report status
- Future
## UW-IT Service Cost

<table>
<thead>
<tr>
<th>Service</th>
<th>RtB</th>
<th>CtB</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service 1</td>
<td>$xx</td>
<td>$xx</td>
<td>$xx</td>
</tr>
<tr>
<td>Service 2</td>
<td>$xx</td>
<td>$xx</td>
<td>$xx</td>
</tr>
<tr>
<td>Service 3</td>
<td>$xx</td>
<td>$xx</td>
<td>$xx</td>
</tr>
<tr>
<td>....</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Server Consolidation

• Costing Study Recommendations

• Current UW-IT Plans
Server Consolidation*
Short Term

• Transition Active Directory services to UW-IT
  • We recommend that UW IT establish a team focused on assisting units with this transition.

• Migrate DNS and DHCP network services to UW-IT
  • We recommend that UW-IT establish a team focused on assisting units with this migration.

• Server & Storage Pilots
  • Conduct a server and storage consolidation and virtualization pilot with a small group of campus units and UW- IT.

* From UW Campus IT Costing Study, March, 2012
UNIVERSITY of WASHINGTON
Server Consolidation*  
Long Term

- Servers & Storage
  - Develop an institutional strategy and direction for server and storage management reflecting both consolidation and virtualization.
  - Additionally, establish institutional policies addressing server requirements and server refresh requirements consistent with institutional green objectives.

* From UW Campus IT Costing Study, March, 2012

UNIVERSITY of WASHINGTON