Agenda

- Welcome and introductions
- IT Strategy Board charge and scope
  - Oversight and compliance responsibilities
  - Interview findings
  - IT Strategy Board priorities
  - Meeting plan and timeline
- Kuali Student review
- IT investments and priorities
- IT Service Investment Board update
  - TRF recommendation
IT Strategy Board
Charge and Scope
IT Governance Membership

Updated 02.13.13
IT Strategy Board Charge

- **Review key IT developments** for impacts to UW and possible adoption of new technologies
- **Recommend critical IT opportunities/actions** to advance UW’s core missions
- **Recommend investments** in new IT capabilities
- **Recommend IT strategic plans, policies and funding priorities** to President/Provost
- **Consider recommendations** by IT Service Investment Board and IT Service Management Board
IT Strategy Board Scope

- All UW-IT activities
  - Includes major projects, service improvements, and infrastructure investments

- University-wide IT activities
  - Includes IT strategies, investments, projects and initiatives
## Proposed 2013 Timeline

<table>
<thead>
<tr>
<th>Month</th>
<th>IT Strategy Board Topic</th>
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</table>
| February 4          | - Priorities and work plan  
                      | - Oversight responsibilities  
                      | - Kuali Student review plan  
                      | - IT projects and priorities |
| May 13              | - Kuali review recommendations and action  
                      | - Recommendations from the IT Service Investment Board and IT Service Management Board  
                      | - Support for research computing |
| October/November    | - Beyond MOOCS, what is next? Other disruptive learning technologies  
                      | - Consumerization and personalization for students  
                      | - Review of 2013 IT Strategy Board  
                      | - Strategic IT priorities for 2014 |
Key Goals for 2013

- Kuali review and recommendation
- Plan for research computing support and committee’s recommendations on funding mechanism
- Priority and plan for student personalization initiatives 2014
IT Strategy Board

Interview Findings
Context

All UW Strategic Challenges

All UW Strategic Technology Challenges

UW-IT SCOPE
Key Technology Issues for UW

- **Teaching & Learning**
  - Support for new methodologies (e.g., teams, flipping, MOOCs)
  - Ensuring students are facile with new technology

- **Research**
  - Facilitating data-driven discovery (including Big Data)
  - Cost-effective research computing (e.g., avoid local clusters)

- **Administrative Systems**
  - Improving decision quality (accurate and consistent data)
  - Reducing UW costs (more automation; fewer shadow systems)

*Underlying Theme: Competitiveness (effectiveness + efficiency)*
*Unresolved: How much better do our administrative systems need to be?*
*Claim: Biggest internal UW challenges are policy + process, not technology*
Improving Academic Support

- **Teaching & Learning** (including course administration and student experience)
  - Technology for flipping, interactive, collaborative teaching
  - Better student systems (e.g., class planning, single bill)
  - Better faculty/administrative tools (e.g., ABB and student hours reports)

- **Research**
  - Excellent infrastructure (good network; alternatives to local clusters)
  - Easier access to cloud services (e.g., simplify billing)

- **Both**
  - Easier access to specialist talent
  - Reduce barriers to collaboration (tools, physical spaces)
  - UW-IT approach: listen, anticipate, be easy to contact
Key Drivers

- Mobile, Cloud, safe, simple, consumer/BYOD
- Agile, flexible, collaborative, social, easy
- High-scale (especially Big Data)
- Need reliable, responsive, cost-effective services
- Infinite demand for more services
- Competition (pushing cost, quality, and speed)
UW-IT Strategy Map 2013 - Revised

**UW Mission**
Learning, Discovery, Service

**UW Business Plan**
Sustain, Compete, Transform

**UW-IT Mission**
- Enable faculty, staff, and students to be more effective
- Foster a community of innovation
- Help UW manage risks and resources

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

Drivers: Open, Mobile, Competitive, Cloud, Collaborative, Personal, Scalable, Secure, Easy

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

Values: Reliable, 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 information management and business systems

**Organizational Goals**
- Exemplary organization
- Strong strategic partnerships
- Culture of exploration and sharing

January 29, 2013
Biggest Threats/Opportunities

- New teaching paradigms (e.g., MOOCs)
- Funding (with all three UW revenue sources at risk)
- Research administrative burden (competitive issue)
- Increasing regulatory burden
- Wrong investment priorities (especially missed opportunities)
- Workload versus resources
- UW's resistance to change
- Faculty trust; curriculum control; administrative policies
- Technology trends: BYOD/Consumerization and Cloud Computing
- Process improvement; understanding UW
Advice for Kelli for IT Strategy Board

- Identify key UW strengths; develop plan to aid
- Identify barriers to UW achievement and remove
- Have clear goals, milestones, roles
- IT Strategy Board needs authority and backing of President Young
- Clarify role versus IT Service Investment Board; no rubberstamping
- Pick 1-2 issues per year; drive to resolution
Educause “Top-Ten Issues, 2012”

1. Updating IT professionals' skills and roles; changing IT management and service delivery models
2. Supporting IT consumerization and BYOD trends
3. Developing an institution-wide cloud strategy
4. Improving the institution's operational efficiency
5. Integrating IT into institutional decision-making
6. Using analytics for critical institutional outcomes
7. Funding IT strategically
8. Transforming the institution's business with IT
9. Supporting the research mission via HPC, large data, analytics
10. Implementing IT governance throughout the institution

Proposed Kuali Student MOU
Renewal Process
Kuali Student Investment History

- May 2008: Strategic Roadmap planning complete
- 2008: UW Staffing allocated to Kuali Student
- 2009: Curriculum Management (CM) 1.0
- 2010: MyPlan development starts
- 2011: UW Curriculum Management implementation initiated
- 2012-13: CM 1.2, CM 2.0
- 2008: UW Curriculum Management (CM) 1.0
- 2009: MyPlan proposed to STFC
- 2010: Enrollment Module Development begins
- 2011: MyPlan Year 1 released
- 2012-13: KS MOU renewal?
Proposed MOU Renewal Process

- Charter committee to assess the UW’s continued investment in Kuali Student as our preferred student system replacement path
- Refine process used for annual assessments, modifying both criteria and process as appropriate
- Deliver recommendation to IT Strategy Board: May 13, 2013
Proposed Committee

**Sponsors:** Jerry Baldasty, Kelli Trosvig

**Chair:** Gary Quarfoth, Associate Vice Provost, Office of Planning and Budgeting, Kuali Student Board

**Ex Officio/Support:** Darcy Van Patten, Director of Student Program, UW-IT

**Proposed Membership:**
- Phil Reid, Associate Vice Provost, UW-IT Academic Services, Professor of Chemistry
- Sara Gomez, Associate Vice President for Information Management, Kuali Student Board
- Virjean Edwards, UW Registrar
- Kay Lewis, Assistant Vice President for Student Life, Director of Financial Aid and Scholarships
- Julia Carlson, Director Graduate Enrollment Management Services
- Kevin Mihata, Associate Dean for Educational Programs, College of Arts & Sciences
- Greg Miller, Chair of Civil and Environmental Engineering
- Michaelann Jundt, Assistant Dean, Undergraduate Academic Affairs
Process: Build from Annual Assessments

- Strategic drivers and functional goals
- Strategic framework for replacement
- Architecture and integration
- Costs
- Peer benchmarking
- Trends in the vendor marketplace
- Outcomes to date
- Current risk profile

Criteria used in annual assessments
IT Investments and Priorities
UW Budget ($3.1B)
Revenue Sources
(Excludes UW Medicine Health System)

- Direct G&C: 38%
- Auxiliary: 22%
- Tuition: 17%
- Gift: 6%
- State: 6%
- DOF: 11%

UW-IT Budget ($97M)
Expenditures

- Admin Systems: 32%
- Networks (Voice & Data) and Data Centers: 30%
- Email & Collab. Tools: 8%
- Servers & Storage: 11%
- Other: 2%
- Security & Access: 6%
- Regional Networks: 6%
- Teaching and Learning: 6%

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UW Total Operating Budget FY2013 ($3.1B) Excludes UW Medicine Health System

UW Budget - excludes IT ($2.9B) 94%

UW-IT Budget ($97M) 3%

Campus Unit IT Budgets ($99M) 3%
UW-IT FY13 Operating Budget ($97M)

- Operations: 79%
- Projects: 21%
Service Taxonomy

- **Common** e.g., email
- **T&L** e.g., Canvas
- **Research** e.g., SQLShare
- **Admin** e.g., HRP
IT Investment Review

Approved & Prioritized by

IT Strategy Board

Example

Improved Student Experience

IT Service Investment Board

Students’ Administrative Systems

IT Service Investment Board

MyPlan, Year 2
Curriculum Management
Course Availability Notifications

Strategy

Program

Project

UNIVERSITY of WASHINGTON
# UW-IT Project by Strategic Goal

## Service Goals

<table>
<thead>
<tr>
<th>Programs</th>
<th>Project 1</th>
<th>Project 2</th>
<th>Project 3</th>
<th>Project 4</th>
<th>Project 5</th>
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<tbody>
<tr>
<td>Telephony</td>
<td>Telecom Core Refresh</td>
<td>UW Medicine Switch Tech Refresh UWMC</td>
<td>K-20 Operations Expansion</td>
<td>Wi-Fi Technology Refresh FY2013</td>
<td>Centralized Address Translation and Firewall Services</td>
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<td>Network</td>
<td>UW Medicine Switch Tech Refresh HMC</td>
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<td>Storage</td>
<td>Upgrade Enterprise SAN Storage (EMC refresh)</td>
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### Advanced productivity and collaboration tools

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<tr>
<th>Personal Productivity</th>
<th>Office 365</th>
<th>UW Event Calendar Replacement</th>
<th>IT Connect Redesign</th>
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### Improved global research support

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<thead>
<tr>
<th>Teaching &amp; Learning</th>
<th>Canvas</th>
<th>Tegrity</th>
<th>eTexts</th>
<th>MyPlan, Year 2</th>
<th>MyPlan, Year 1</th>
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<tr>
<td>Student Admin Systems</td>
<td>Course Availability Notifications</td>
<td>Curriculum Management Implementation</td>
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### Improved student experience

<table>
<thead>
<tr>
<th>Enterprise Data Warehouse</th>
<th>Student Course Enrollment</th>
<th>Tableau Business Intelligence Tools</th>
<th>EDW Infrastructure Renewal</th>
<th>Migration &amp; Academic Release</th>
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<td>HR/Payroll</td>
<td>HRP Replacement System Procurement &amp; Contract Negotiations</td>
<td>Enterprise Pilot</td>
<td>Feasibility Assessment</td>
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<td>Finance</td>
<td>UW-IT Financial Management System Implementation</td>
<td>My Financial Desktop</td>
<td>JDE Upgrade 2012</td>
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<td>Recruitment</td>
<td>Recruiter 2.0 Deployment</td>
<td>MS Dynamics CRM Proof of Concept</td>
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<td>Kuali</td>
<td>Kuali Student</td>
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### Modern information management and business systems

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<tr>
<th>Business Continuity</th>
<th>FY13 Geographic Redundancy</th>
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<td>Security and Privacy</td>
<td>UW NetID Password Policy Foundations Project</td>
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### Business continuity, security, and privacy

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<th>Organizational Goals</th>
<th>Exemplary organization</th>
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<td>IT Service Management</td>
<td>ITSM Toolset Selection</td>
<td>ITSM Toolset Deployment</td>
<td>Request Fulfillment</td>
<td>Incident Management</td>
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<td>Giganop</td>
<td>PNWGP WA 40G Network</td>
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### Strong strategic partnerships

- Culture of exploration and sharing

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**UNIVERSITY of WASHINGTON**

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IT Governance Update:
IT Service Investment Board
TRF Recommendation
TRF Recommendation

- **Maintain current TRF methodology** for FY 2014 and FY 2015 with the following adjustments:
  - Include University support services (CISO, data centers, and student learning centers)
  - Exempt UW Medicine from Student Database System (SDB) costs

- **Review TRF rates** next year to accommodate changes in total costs or service levels
Proposed FY 2014 TRF Rates

- With adjustments, FY 2014 rates will be:
  - $54.50 per month per capita for all academic and administrative units
    • Represents a 3.5 percent increase over current rate of $52.68
  - $50.00 per month per capita for UW Medical Centers
    • Represents a 7.1 percent decrease over current rate of $53.43
Basic Bundle of Services

- Accessible Technologies
- Accounts and Passwords
- Administrative Systems Infrastructure
- Basic Backup and Storage
- Basic Data Networks
- Campus Software Licensing
- Email, Calendaring and Collaboration Tools
- Teaching & Learning Tools
- Technology Emergency Preparedness
- Telecom Infrastructure
- UW Enterprise Portal
- Web Publishing
Questions & Discussion