Agenda

- UW-IT Service Portfolio Allocation
  — Strategy Board input
- Teaching and Learning: New Services and Analytics
- FY 2016 TRF Review
- FY 2015 Portfolio Prioritization and Scoring Process
UW-IT Service Portfolio Allocation
Service Portfolio

- 7 Service Categories
- Tied to Strategic Goals (+1)
- IT Strategy Board to balance the investment and spend allocation across the Service Portfolio
- IT Service Investment Board to prioritize investment within Service Categories, based on that allocation profile
<table>
<thead>
<tr>
<th>Service Category</th>
<th>Run</th>
<th>Invest</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching &amp; Learning</td>
<td>$3.4M</td>
<td>$0.1M</td>
<td>$3.6M</td>
</tr>
<tr>
<td>Research</td>
<td>$0.3M</td>
<td>$0.1M</td>
<td>$0.4M</td>
</tr>
<tr>
<td>Administration</td>
<td>$15.3M</td>
<td>$4.0M</td>
<td>$19.3M</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>$19.8M</td>
<td>$1.8M</td>
<td>$21.5M</td>
</tr>
<tr>
<td>Collaboration</td>
<td>$1.5M</td>
<td>$0.6M</td>
<td>$2.0M</td>
</tr>
<tr>
<td>Enterprise Risk</td>
<td>$2.6M</td>
<td>$1.9M</td>
<td>$4.5M</td>
</tr>
<tr>
<td>IT Management</td>
<td>$0.6M</td>
<td>$1.4M</td>
<td>$2.0M</td>
</tr>
<tr>
<td><strong>Total Labor</strong></td>
<td><strong>$43.5M</strong></td>
<td><strong>$9.9M</strong></td>
<td><strong>$53.4M</strong></td>
</tr>
</tbody>
</table>

†Expenditures from first half year, annualized

*Labor only
Service Categories

- Teaching & Learning
- Research
- Administration / Business
- Infrastructure
- Collaboration (cross-cutting)
- Enterprise Risk (cross-cutting)
- IT Management (organizational overhead)
UW-IT Service Portfolio
Expenditures & Strategic Allocation* - FY14†

- **TEACHING & LEARNING:** 4%
- **RESEARCH:** 33%
- **ADMIN BUSINESS SERVICES:** 21%
- **INFRASTRUCTURE (INCL. DATACENTER, NETWORKS):** 8%
- **COLLABORATION TOOLS:** 42%
- **ENTERPRISE RISK:** 70%
- **IT MANAGEMENT:** 4% (Run Cost), 1% (Investment)

**Category Spend:**
- **TEACHING & LEARNING:** 7%
- **RESEARCH:** 1%
- **ADMIN BUSINESS SERVICES:** 36%
- **INFRASTRUCTURE (INCL. DATACENTER, NETWORKS):** 40%
- **COLLABORATION TOOLS:** 4%
- **ENTERPRISE RISK:** 9%
- **IT MANAGEMENT:** 4%

**Investment Allocation:**
- **TEACHING & LEARNING:** 1%
- **RESEARCH:** 1%
- **ADMIN BUSINESS SERVICES:** 40%
- **INFRASTRUCTURE (INCL. DATACENTER, NETWORKS):** 18%
- **COLLABORATION TOOLS:** 6%
- **ENTERPRISE RISK:** 19%
- **IT MANAGEMENT:** 14%

†Expenditures from first half of year, annualized
*Labor only
Strategy Board Input

- Endorsed increased investment in research support
- Proposed including research administration (ORIS) in future analysis
- Suggested providing a view of total University IT spend (excluding Medical Centers)
Research Investments

- **FY 14**
  - 40Gb Campus Backbone
  - Azure
  - Backup and Archive Service (*proposed & deferred*)
  - Big Data in Hyak (*proposed & deferred*)

- **FY 15**
  - “Storage, Consulting & Tools for Researchers”...
    - Big Data: better data exchange beyond campus
    - Improved storage services for researchers
    - Access to Open Science Grid
Teaching and Learning: New Services and Analytics

Philip J. Reid
Associate Vice Provost, UW-IT Academic Services
Professor of Chemistry
Canvas: Learning Management System
Origins & History

- Canvas learning management system (LMS) piloted in 2011 and then selected as central LMS
- Launched Autumn Quarter 2012
- UW Bothell and UW Tacoma have transitioned to Canvas from Blackboard. UW Seattle still employing an “opt in” model for adoption
- Adoption continues to grow at UW Seattle
# Overdue Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Date</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical Reflection on Learning</td>
<td>Dec 13, 2012 11:55pm</td>
<td>out of 100</td>
</tr>
<tr>
<td>Quiz</td>
<td>Nov 15, 2012 11:59pm</td>
<td></td>
</tr>
<tr>
<td>Qualitative Review</td>
<td>Oct 27, 2012 10pm</td>
<td>out of 100</td>
</tr>
<tr>
<td>Quantitative Review</td>
<td>Nov 17, 2012 11:59pm</td>
<td>out of 100</td>
</tr>
<tr>
<td>Draft: Research Question</td>
<td>Oct 10, 2012 11:59pm</td>
<td></td>
</tr>
<tr>
<td>Draft of Methodology</td>
<td>Oct 17, 2012 11:59pm</td>
<td></td>
</tr>
<tr>
<td>Collecting, Analyzing, and Presenting</td>
<td>Nov 14, 2012 12am</td>
<td></td>
</tr>
<tr>
<td>Draft of Inquiry Project</td>
<td>Nov 28, 2012 11:59pm</td>
<td></td>
</tr>
<tr>
<td>Inquiry Project Final Paper</td>
<td>Dec 6, 2012 5:30pm</td>
<td>out of 100</td>
</tr>
</tbody>
</table>

# Upcoming Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Date</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engaged Discussion</td>
<td>Dec 6, 2012 5:30pm</td>
<td>out of 100</td>
</tr>
</tbody>
</table>
Canvas adoption over time

- **Bothell**: (18%) (62%)
- **Seattle**: (19%) (59%)
- **Tacoma**: (53%) (49%)
What students access Canvas for

**Overall Canvas Usage**

- Courses: 546
- Assignments: 5,939
- Discussion Topics: 2,878
- Files uploaded: 14,775
- Media Recordings: 3,226

**Overall Participation by Activities**

- Assignments: 600K
- Discussions: 200K
- Files: 100K
- Quizzes: 50K
Satisfaction with Canvas

**Faculty**
- Extremely Satisfied: 9%
- Satisfied: 53%
- Neutral: 27%
- Dissatisfied: 10%
- Extremely Dissatisfied: 2%

**Students**
- Extremely Satisfied: 16%
- Satisfied: 58%
- Neutral: 18%
- Dissatisfied: 6%
- Extremely Dissatisfied: 1%
Notify.UW: Course Notification
Origins & History

- Released in April 2013 as an official replacement for UW Robot, a “third party” availability notification service
- Notifies students via email or text message when a closed course reopens
Course demand by curriculum

- Size represents the number of subscribers by unique UW NetIDs
- Colors represents the number of unregistered subscribers
Communication courses
Communication courses

COM 201

COM 202

COM 220
MyPlan: Academic Planning
MyPlan – Online Academic Planning

Progress Tracking

Academic Planning

Registration Planning
What is MyPlan?

MyPlan is an academic planning tool that allows students to, **up to 6 years in advance**:

- Plan specific courses to take
- Add placeholders for courses TBD
- Identify back-up courses
- Bookmark courses of interest

**Their planning** can inform **our planning** ...

**Academic Year 2014-2015**

Create your plan by finding and adding courses and their sections to any quarter. Learn more

**AUTUMN 2014**
- Planned
- CHEM 142 (5)
- MATH 124 (5)
- C (s)
- Add course or placeholder

**WINTER 2015**
- Planned
- CHEM 152 (5)
- MATH 126 (5)
- VLPA (s)
- Add course or placeholder

**SPRING 2015**
- Planned
- ECON 200 (5)
- PHYS 121 (5)
- MATH 126 (5)
- Add course or placeholder

**SUMMER 2015**
- Planned
- Study Abroad
- Add course or placeholder

**YOUR STUFF**

- Bookmarked Courses
- SPLING 405 SPANISH PHONETICS (5)
- FSTDY 299 STUDY ABROAD (1-12)
- ENGL 121 COMPOSITION: SOCIAL ISSUES (5)

**Recent Plan Audits**

- PLAN INCLUDES
  - OCT 18
  - 7 COURSES
  - 35 CREDITS
  - 18 SP
  - 12:39 PM
  - Civil Engineering

**Recent Degree Audits (DARS)**

- No recent Degree Audits found.
To what extent are students using MyPlan?

• To date, over 12,000 students have created a plan
• For Fall 2013:
  • 21% of all students have a plan
  • 30% of all undergraduate students have a plan
• And adoption is on rise – over 800 new plans created in the first two weeks of October alone!

How far into the future are they planning?

• The majority of MyPlan users are planning beyond the current term
  • Nearly 40% have planned for the remaining current academic year (2013-14)
  • Nearly 30% have planned for the next academic year, 2014-15 and beyond
  • A small number have planned to Spring 2017!
What are they planning?

- MyPlan users have added over 100,000 items to their plans
- The overwhelming majority (96%) of these items are courses
  - Placeholders account for less than 2% of planned items
- Students are telling us exactly what they plan to take and when they plan to take it!

How will we use these data?

- Over time, as adoption increases and predictability of behavior improves (i.e., *do students do what they plan? and if not, why?*) these data drive supply
- A pilot project to develop a dashboard that integrates demand and behavior with supply is underway
MyPlan Developments

- **Intelligence:** student profiles and personalization
- **Program exploration:** admission, progress, and completion requirements
- **Student success and retention:** alerts and notifications
- **Analytics:** advising dashboard, demand analysis
- **Outreach:** Gates Foundation grant to support academic planning for CTC students
FY 2016 Technology Recharge Fee Review
TRF for FY 2015
(Approved by the Provost)

Campus Rate $54.50 mo.*

Medical Center Rate $50.00 mo.**

Rate & Methodology Consistent with FY 2014

* Supplements existing GOF/DOF resources to provide Basic Services
** Excluded from GOF/DOF Subsidy, Network, & Telecom billed separately.
TRF Advisory Committee
FY 2016 Rate Review Process

Recommend changes to the TRF methodology:

– Move to a more transparent and simpler allocation methodology
– Align with current UW-IT organization and services
– Include Information Management and Campus Technology & Events (new to UW-IT)
– Review treatment of students
– Review allocation of UW-IT’s GOF/DOF
Parallel Processes

- **ABB**
  - Provost/OPB Review Committee
  - Paul Jenny, AVP
  - Begin FY 2012

- **TRF**
  - Svc Investment Board
  - Kellye Testy, Chair
  - Begin FY 2011

- **HR/P**
  - HR/P Sponsors Group
  - V’Ella Warren, Chair
  - Begin FY 2017
  - Methodology TBD
## 2016 TRF Annual Review Timeline

<table>
<thead>
<tr>
<th>Month</th>
<th>IT Service Investment Board</th>
<th>TRF Advisory Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 2014</td>
<td><strong>Meeting: March 3rd</strong>&lt;br&gt;Review Timeline/Process&lt;br&gt;Provide direction to TRF Advisory Committee</td>
<td><strong>Meeting: April 7</strong>&lt;br&gt;Preliminary brainstorm/review of changes to the TRF process and methodology</td>
</tr>
<tr>
<td>April/May</td>
<td><strong>Meeting: April 21 &amp; May 23</strong>&lt;br&gt;Review any issues/questions from TRF Advisory Committee</td>
<td><strong>Meeting: May 2</strong>&lt;br&gt;Review of TRF process and methodology</td>
</tr>
<tr>
<td>Summer 2014</td>
<td><strong>No Meetings</strong></td>
<td><strong>Meeting: July/August</strong>&lt;br&gt;TRF - Modeling</td>
</tr>
<tr>
<td>Fall 2014</td>
<td><strong>Meeting: Fall</strong>&lt;br&gt;Provide Guidance on outstanding Issues&lt;br&gt;Review TRF recommendations&lt;br&gt;Submit TRF recommendation to the Provost</td>
<td><strong>Meeting: Fall</strong>&lt;br&gt;Develop recommendation on TRF methodology and rates for the IT Service Investment Board</td>
</tr>
</tbody>
</table>
UW-IT Portfolio Prioritization and Scoring Process
Many projects - from 30,000 feet

- 63 projects -
  - 309,000 hours
  - all important
  - but... *far greater than our capacity*

*What to do?*

*Prioritize*
Many projects - from 30,000 feet

7 Service Categories, aligned with UW-IT strategic goals

<table>
<thead>
<tr>
<th>Service Category</th>
<th># proposals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching &amp; Learning</td>
<td>6</td>
</tr>
<tr>
<td>Research</td>
<td>6</td>
</tr>
<tr>
<td>Administrative/Business</td>
<td>23</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>14</td>
</tr>
<tr>
<td>Collaboration</td>
<td>3</td>
</tr>
<tr>
<td>Enterprise Risk</td>
<td>4</td>
</tr>
<tr>
<td>IT Management</td>
<td>7</td>
</tr>
</tbody>
</table>
Project Prioritization

- Simplified criteria
- Simplified scoring
- Business cases clarified
- Multiple perspectives
  - by service categories
  - with balanced investment allocations
  - through multiple comparative “lenses”

**better differentiation**
Governance Oversight

- **IT Strategy Board**
  - Service Portfolio - 7 strategic service categories, relative allocation

- **IT Service Investment Board**
  - Project Portfolio - 63 investment proposals (scoring 10-12)

- **IT Service Management Board**
  - Service Catalog - approx. 40 services
  - Service prioritization - future
UW-IT Service Portfolio
Expenditures & Strategic Allocation* - FY14†

Investment Pct within Service Category

Category Spend
- Teaching & Learning: 7%
- Research: 1%
- Admin Business Services: 36%
- Infrastructure (Incl. Datacenter, Networks): 40%
- Collaboration Tools: 4%
- Enterprise Risk: 9%
- IT Management: 4%

Investment Allocation
- Teaching & Learning: 1%
- Research: 1%
- Admin Business Services: 40%
- Infrastructure (Incl. Datacenter, Networks): 18%
- Collaboration Tools: 6%
- Enterprise Risk: 19%
- IT Management: 14%

†Expenditures from first half of year, annualized
*Labor only
<table>
<thead>
<tr>
<th>January, 2014</th>
<th>Business Case development</th>
</tr>
</thead>
<tbody>
<tr>
<td>February</td>
<td>PRB scoring and ranking (all)</td>
</tr>
<tr>
<td>March</td>
<td>SIB scoring and ranking (~10-12)</td>
</tr>
<tr>
<td>April</td>
<td>SIB review results and discussion (initial)</td>
</tr>
</tbody>
</table>
| May          | SIB second scoring (if warranted)  
               Final discussions and recommendations |
<table>
<thead>
<tr>
<th>Date Range</th>
<th>Duration</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 3</td>
<td></td>
<td><strong>meeting</strong> Review and input on portfolio allocation</td>
</tr>
<tr>
<td>Mar 7 to Apr 4</td>
<td>4 wks</td>
<td>Scoring of ~12 proposals</td>
</tr>
<tr>
<td>April 4</td>
<td>(Friday)</td>
<td>Scoring DUE</td>
</tr>
<tr>
<td>April 21</td>
<td><strong>meeting</strong></td>
<td>Stakeholder presentations and initial review/discussion of scoring results</td>
</tr>
<tr>
<td>Apr 21 to May 12</td>
<td>3 wks</td>
<td>2nd round scoring, if needed</td>
</tr>
<tr>
<td>May 12</td>
<td>(Monday)</td>
<td>2nd round scoring DUE</td>
</tr>
<tr>
<td>May 23</td>
<td><strong>meeting</strong></td>
<td>Rankings finalized and recommendations</td>
</tr>
</tbody>
</table>
Projects to Score (10)

- Academic Explorer
- My Husky Experience Implementation
- Curriculum Management Course Management Build Out
- Storage, Consulting & Tools for Researchers
- Network-based Collaboration Apps
- HR/Payroll Core Implementation and Integrations
- Enterprise Business Services Program Startup
- Financial Systems Modernization: Discovery
- Institutional Animal Care and Use Committee System
- Seattle Domestic Undergraduate Admissions Modernization Implementation
Scoring Packets

- Online
- 10-12 Business Cases (2 pages each)
- Worksheet
- Criteria
- Instructions
Sample View of Results

Infrastructure
Basic Metrics

Likelihood of Success vs. Importance Chart

- Hybrid Cloud
- Network Switch Refresh
- Web Hosting
- NetID PW Reset
- Improve Access
- Optical Network Refresh
- UWWI CSI
- Monitoring Improvements
- DBA Test Env.
- DB Platform
- Postmaster Redesign
- Nebula CSI
- CMG Retire.
Sample View of Results

Infrastructure

Who Benefits?

- Hybrid Cloud
- NetID PW Reset
- Improve Access
- CIFER
- Network Switch Refresh
- Web Hosting
- Optical Network Refresh
- CMG Retire.
- Postmaster Redesign
- DB Platform
- DBA Test Env.
- Nebula CSI
- UWWI CSI

Organizational Efficiency

Personal Productivity
Sample View of Results

**Infrastructure**

Further the Mission or Differentiate?

Graph showing various projects and initiatives such as Network Switch Refresh, Web Hosting, Improve Access, Hybrid Cloud, NetID PW Reset, Nebula CSI, Postmaster Redesign, CMG Retire, DB Platform, DBA Test Env, CIFER, and Optical Network Refresh. The graph plots on a plane showing differentiation and mission alignment.
Sample View of Results

Impact - Visible or Hidden?

Infrastructure
Questions & Discussion