Agenda

- UW-IT Portfolio Scoring Process
- Scoring Results
- TRF Update
- Wrap Up
UW-IT Portfolio Scoring Process
Purpose

Many projects --51
  – 287,000 hours
  – all important
  – but... far greater than our capacity
  – and...HR/Payroll requiring greater resources

What to do?

Prioritize
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†

<table>
<thead>
<tr>
<th>Category</th>
<th>Investment</th>
<th>Run Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching &amp; Learning</td>
<td>4%</td>
<td>33%</td>
</tr>
<tr>
<td>Research</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Admin Business Services</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Infrastructure</td>
<td></td>
<td>42%</td>
</tr>
<tr>
<td>(Incl. Datacenter, Networks)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collaboration Tools</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Enterprise Risk</td>
<td></td>
<td>70%</td>
</tr>
<tr>
<td>IT Management</td>
<td></td>
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</tbody>
</table>

†Expenditures from first half of year, annualized

*Labor only
## Timeline - FY 2015

<table>
<thead>
<tr>
<th>Month</th>
<th>Activity Description</th>
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<tbody>
<tr>
<td>January, 2014</td>
<td>Business Case development</td>
</tr>
<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>
<tr>
<td>May</td>
<td>SIB second scoring (if warranted)</td>
</tr>
<tr>
<td></td>
<td>Final discussions and recommendations</td>
</tr>
</tbody>
</table>
Overview of Business Case Proposals
Teaching & Learning
   — Academic Explorer
   — MyHusky Experience – Implementation
   — Curriculum Management - Build Out

Administration/Business Systems
   — Seattle Undergraduate Admissions Modernization
   — HR/Payroll – Core Implementation and Integrations
   — Enterprise Business Services Program - Startup
   — Financial System Modernization: Discovery

Research
   — Storage, Consulting & Tools for Researchers

Collaboration
   — Network-based Collaboration Apps
Teaching & Learning
Academic Explorer
MyHusky Experience - Implementation
Curriculum Management - Build Out

Idea

<table>
<thead>
<tr>
<th>Courses</th>
<th>Proposal Process</th>
<th>Administrative Screens</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs</td>
<td>View</td>
<td>Create</td>
</tr>
<tr>
<td>Learning Unit</td>
<td>Modify</td>
<td>Retire</td>
</tr>
<tr>
<td></td>
<td>Group</td>
<td>Analyze</td>
</tr>
</tbody>
</table>

Catalog
Administration/Business Systems
Seattle Undergraduate Admissions Modernization
Enterprise Business Services Program - Startup

Document Management (EDMS) Fully Funded
- Project scoping/planning – ID need for other components
- Resourcing (cookbook approach/unit resource contributions
- Project Implementation

Workflow (AIS) 1 FTE
- Require LEAN project as prioritization criteria
- Project scoping/planning – ID need for other components
- Resourcing (cookbook approach/unit resource contributions

Lean/Agile Business Process Transformation 1 FTE
- Coordinating with OEP & F2 (Ruth Johnston/LuAnn Stokke)
- Lean/Agile Approach
- Toolkit for initiating a Lean Project; identify both non-technical and technical improvements supported by the tools.
- EDMS & AIS Staff trained to “pull” LEAN outcomes

Web Services/integration (AIS) 1 FTE
- Defined as workflow requirements associated with document/data utilized to streamline business process
- TBD – direct or indirect service

Web Forms/Applications & Notifications 1 FTE
- Canned forms that can be modified to provide a user interface for each step
Financial Systems Modernization Roadmap

HR/P Modernization
HR/P-Finance Business Intersections

- Retroactive salary transfers (MyFD)
- Salary Revision (BGT)
- Payroll expense load (FAS)
- Faculty effort certification (eFECS)
- Other (TBD in HRP Design)

Finance System Modernization

Finance System Modernization Activities

Ariba/eProcurement

Continue Implementation New System Integration
Research
Storage, Consulting & Tools for Researchers

**Custom Pillar**
- Research Team X
  - Research Efforts: Workflows, Simulations, (big) Data, Results
  - Departmental Cyber-Infrastructure (CI)
  - Departmental Local Area Network (LAN)
  - UW Central Hosted CI (DataCenters)
  - Campus Backbone Network / Datacenter Networking
  - UW Shared CI (DataCenters + HSRN): Hyak, lolo, common software, Experts
  - High Speed Research Network (HSRN)
  - Internet 2
  - Commercial Clouds
  - National resources: XSEDE, OSG, BOINC

**Shared Infrastructure**
- Research Team 1
  - Research Efforts: Workflows, Simulations, (big) Data, Results
  - Departmental Cyber-Infrastructure (CI)
  - UW Shared CI (DataCenters + HSRN): Hyak, lolo
  - High Speed Research Network (HSRN)
  - Campus Backbone
  - Commercial Clouds (Azure, AWS, Google)
  - Departmental LANs
  - UW Central Hosted CI (DataCenters)
  - National resources: XSEDE, OSG, BOINC

**Cyber-Infrastructure includes:** Applications, Code Libraries, Analysis tools, UW Middleware Integrations (Identity, Groups, Job Queuing, ..), Servers and Storage (HPC+scratch, commodity, shared, archival, ...) and Experts that know how to use and maintain.
Collaboration
UW-IT Collaboration Services

COLLABORATION SERVICES

1. Avaya Softphone
2. Voicemail Integration
3. Phone Integration: MS Lync
4. Phone Integration: Google Apps
5. Fax Server
6. Audio Conference Integration
7. Video Conferencing Integration

UW Telephone Core Infrastructure

UW Data Center
Scoring Results
Teaching & Learning
Impact - Visible or Hidden?

Organizational Efficiency

Differentiation

CM2 Build-Out
Academic Explorer
MyHusky Impl.

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Research
Basic Metrics

Storage, etc. for Research
SIB Business Cases

Basic Metrics

Likelihood of Success vs Importance

- HR/P - Integrations
- Fin. Sys Modern. Discovery
- Academic Explorer
- EBS Startup
- MyHusky Impl.
- Storage, etc. for Research
- Network-based Collab
- CM2 Build-Out
TRF Update
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
TRF Advisory Committee Timeline

- **Spring >>** Review Principles
  Discuss Methodology/Criteria

- **Summer >>** Develop Proposed UW-IT Budget
  Update Services
  Data Modeling for TRF

- **Fall >>** Discuss/Validate Outcomes
  Review with Service Investment Board
Conflicting Principles

TRF Advisory Committee feels we are close to the right balance and current methodology is “equally unfair”.

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Challenge: Alignment of TRF with current UW-IT Org
TRF Advisory Committee Outcomes – 4/7/14

- Focus on opportunities to reduce complexity and improve transparency
- Maintain current treatment of IT costs for students
- Explore alignment of TRF with current UW-IT organization and services
  - Assess fiscal impact
- Coordinate with HR/P Cost Allocation committee on per capita methodology
Questions & Discussion