



# IT Service Investment Board

January 13, 2014

# Agenda

- IT Service Management Board Services to Retire Recommendation
- UW-IT ServiceNow Implementation
- HR/Payroll Update
- UW-IT Portfolio Prioritization Process
- Wrap Up

# IT Service Management Board Services to Retire Recommendation

# Overview - Methodology

- Purpose: to familiarize SMB members with overall service catalog
- Fast first impressions survey
- Didn't have detailed cost info; cost was not a primary consideration
- Obvious services, “low-hanging fruit”
- Recommendations with UW CompDirs

# Create Capacity

- Next round, will look at a full picture of service costs for entire Service Catalog
  - Run (operations)
  - Improvements (projects)
- **Goal: create capacity** for adding new services or improving high-value services, **by retiring or “shrinking” lower-value services**

# Recommendations

- Services to Retire (7)
- Services to move out of UW-IT (2)
- Services to change (2)

# Services to Retire

- Alpine/Web Alpine
- IMAP – UW Software Toolkit
- On-premises email (IMAP)
- On-premises email (Exchange; assuming successful Office 365 migration)
- UW Applications Portfolio
- Computer and Printer troubleshooting/maintenance
- Husky Kiosk Service

# Services to Move Out of UW-IT

- Pager Service: to UW Medicine
- Husky TV



# Services to Review for Change

- Videoconference Studios
- Mobile Phone Support

# Questions

# IT Service Management - *ServiceNow* Project

Overview for  
IT Service Investment Board

January 13, 2014

Erik Lundberg  
Mick Westrick

# What is Service Management?

- A paradigm shift from managing IT as *stacks of individual technical components* to
  - focusing on the delivery of end-to-end services
  - using best practice process models (ITIL)
  - emphasizing benefits to customers
- It's about the business, not the technology!

# ServiceNow

Industry Best-of-breed

- SaaS - continual updates, browser-based, with auto-failover / disaster recovery / business continuity baked in
- Robust security language (FERPA, HIPAA)
- Named licenses for “process users”, no end-user licenses, “blended” rate to account for part-time student staff
- Covers Harborview & UW Medical Center
- Covers all WA public higher ed

# Drivers and Benefits

- Improve the User Experience and coordination with Distributed IT
- Standardize and streamline processes, improve efficiency - ITIL as best practice framework
- Increase technical staff productivity and satisfaction
- Reduce number of tools, process variations
- Reduce duplicate data entry

# Project Roadmap

- Six month planning - *just completed*
- 24-month roadmap for about six ITIL processes, in four distinct projects - *just started*
- ServiceNow will replace existing *ticket-tracking* software widely used across campus - and other internal apps
- It's big - but will create capacity down the road, in UW-IT and in campus units

# Advantages for Campus IT

- Integrated Help Desk
- Integrated Service Catalog
- Units will leverage UW-IT learning curve
- Business School participating in planning phases - early adopter



# Related Advantages for Campus IT

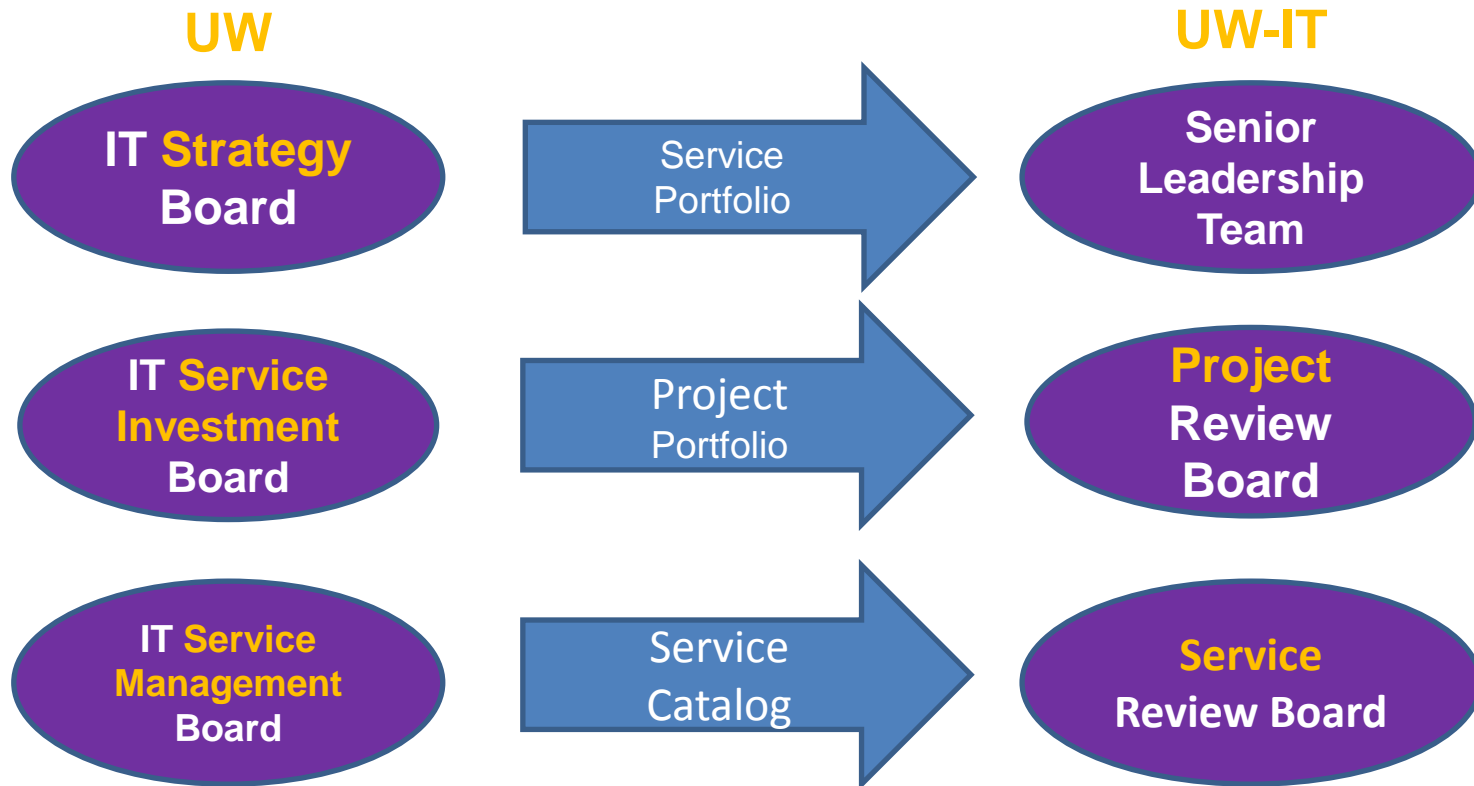
- Adoption of Commodity Services (B-School):
  - **LMS:** Blackboard → Canvas
  - **Lecture Capture:** MediaSite → Panopto
  - **Help Desk:** RT → ServiceNow
  - **Co-location:** printer closets →  
central data center
  - **Servers & Storage:** local →  
hybrid cloud, Archive/Backup
- Service Management + Commodity Services  
≡ greater efficiency at lower cost

# Campus IT Partnerships *alignment*

- “Commonize” processes
  - adoption of service management
  - ITIL - common vocabulary
  - Best Practices
- ITIL Foundations training - 7 classes held
  - UWIT: 210
  - Campus IT: 108
- Define and document local services, roles, and workflows, based on ITIL

# Empower Governance through Service Portfolio Management

Early Draft



# Service Categories

- Teaching & Learning
- Research
- Administration
- Infrastructure
- Collaboration
- Enterprise Risk Management

# Longer Term Vision

- ServiceNow can support non-IT business process workflow
- UW-IT will do a pilot project with internal business services (B&F, HR, PMO, Facilities)
- HR/P - an ideal driver for Business Process Improvement connection with Service Management

# Questions?

ITSM Blog: <http://blogs.uw.edu/uwitsm/>



# HR/P Update

IT Service Investment Board  
January 13, 2014

# Objectives

1. Demonstrate the need for modernization
2. Discuss our opportunity and anticipated benefits
3. Outline next steps and the timeline
4. Discuss impact on resources
5. Answer your questions





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# **THE NEED FOR HR/P MODERNIZATION**

# Technology has Changed Our World

Technology has changed dramatically between the 1980s and today:

- Typewriters → Computers
- Classified Job Ads → Internet Job Postings
- Handwritten Pay Checks → Direct Deposit
- Wired telephones → Smartphones
- Floppy Discs (170 KB) → Thumb Drives (32 GB)
- Commodore 64 Computer → Laptops and Tablets



# UW has Changed: 1982-Now

The current payroll system was implemented in 1982; the UW's business needs have evolved significantly since then.

		1982	Today
<b>Annual Revenue</b>		\$552 million	\$4.6 billion
<b>Primary Revenue Sources</b>	State appropriation	28% (\$154M)	6% (\$276M)
	Tuition and fees	13% (\$71.8M)	13% (\$598M)
	Research grants and contracts	27% (\$149M)	30% (\$1.38B)
	Patient care	14% (\$77.3M)	29% (\$1.33B)
<b>Human Resources</b>	Number of employees	20,000	40,000
	Number of faculty	2,496	3,927
	Unionized staff	7,000	17,000

# UW's Compliance Profile has Changed

	1982	Today
Scope of bargaining agreements	<i>Prohibited</i> from negotiating salary, hours of work, overtime, premium pay, leave, corrective action, performance management	Civil Service Reform <i>opened the scope of bargaining to include all of these areas</i>
Geographic compliance scope	3 states N/A	29 states 66 countries
Federal, state, and hospital requirements and regulations	HEPPS was implemented to be compliant for the time, but lacks the flexibility to keep up with change	Over 30 major federal regulatory programs and requirements, numerous changes to state and hospital rules & regulations, including: ADA, FMLA, COBRA, FLSA for state employers, new state retirement and insurance eligibility rules, extension of bargaining rights to temporary employees, new Joint Commission rules, etc.

# A Complex Workforce

UW's complex workforce of 40,000 includes:

- 11,000 medical center employees
- 300+ employees in 26 other countries
- 4,400 graduate students with health benefits
- 365+ earning types (regular, hourly, etc.)
- 165+ unique pay differentials or premiums
- 4,000 retirees
- 9 unions representing 16,000+ employees

# However...

The technology to support UW's complex needs is  
**32 years old!**

# Our Opportunity

- Replace UW's existing payroll system with a *modern*, integrated HR and payroll system
- Implement a technology platform that allows UW to outsource the infrastructure
- Implement standardized HR and payroll processes and practices across the entire University
- Reduce UW's risks, realize efficiencies, enable modern practices, and provide better competitive positioning.

# Recommended Vendor: Workday

- Software-as-a-Service
- Core functionality delivered in 22 months
- Iterative approach to implementation
- Will partner with IBM for implementation
- Other higher-ed institutions using Workday include:
  - Brown
  - Carnegie Mellon
  - Cornell
  - Georgetown
  - NYU
  - USC
  - UT Austin
  - Yale





# Anticipated Benefits

## Realize Efficiency

*Eliminate Waste*

- Streamline labor-intensive, manual processes through automation and technology
- Eliminate unnecessary administrative burden
- Eliminate rework and adjustments due to poor data quality
- Provide a single source of accurate employee data

## Enable Modern Practices

*Implement Best Practices*

- Enable enterprise-wide HR/P processes through leading / best-practice application
- Create bandwidth to focus on strategic initiatives
- Provide accurate, timely employee data for use across UW
- Increase transparency into HR/P processes, metrics, and data

## Reduce Operational Risk

*Strengthen Compliance*

- Manage critical compliance concerns through technology
- Keep pace with ever-changing regulatory requirements
- Support operations with reliable technology platform
- Enable business continuity and disaster recovery functionality for HR and payroll

## Provide Better Competitive Positioning

*Support Attracting & Retaining the Best People*

- Redeploy current transaction-based workforce to value-add activities
- Create a progressive administrative environment
- Enable a stronger recruiting web presence
- Provide comprehensive data for decision making
- Provide better customer service

# Impacts All UW Workforce Members

Every member of UW 's workforce will be impacted:

- **Faculty, Staff, and Student Employees** will use a new interface to:
  - Quickly access earning statements, leave balances, and time off requests;
  - View and change direct deposits and W2 withholdings; and
  - Change personal information, such as contact information and benefits selections.
- **Managers and Supervisors** will be able to easily review employee schedules, approve time-off requests, track credentials, and recommend training opportunities for staff.
- **Staff with HR/payroll processing responsibilities** in their departments may experience some work shifting from one office to another or new methods of accomplishing certain actions.



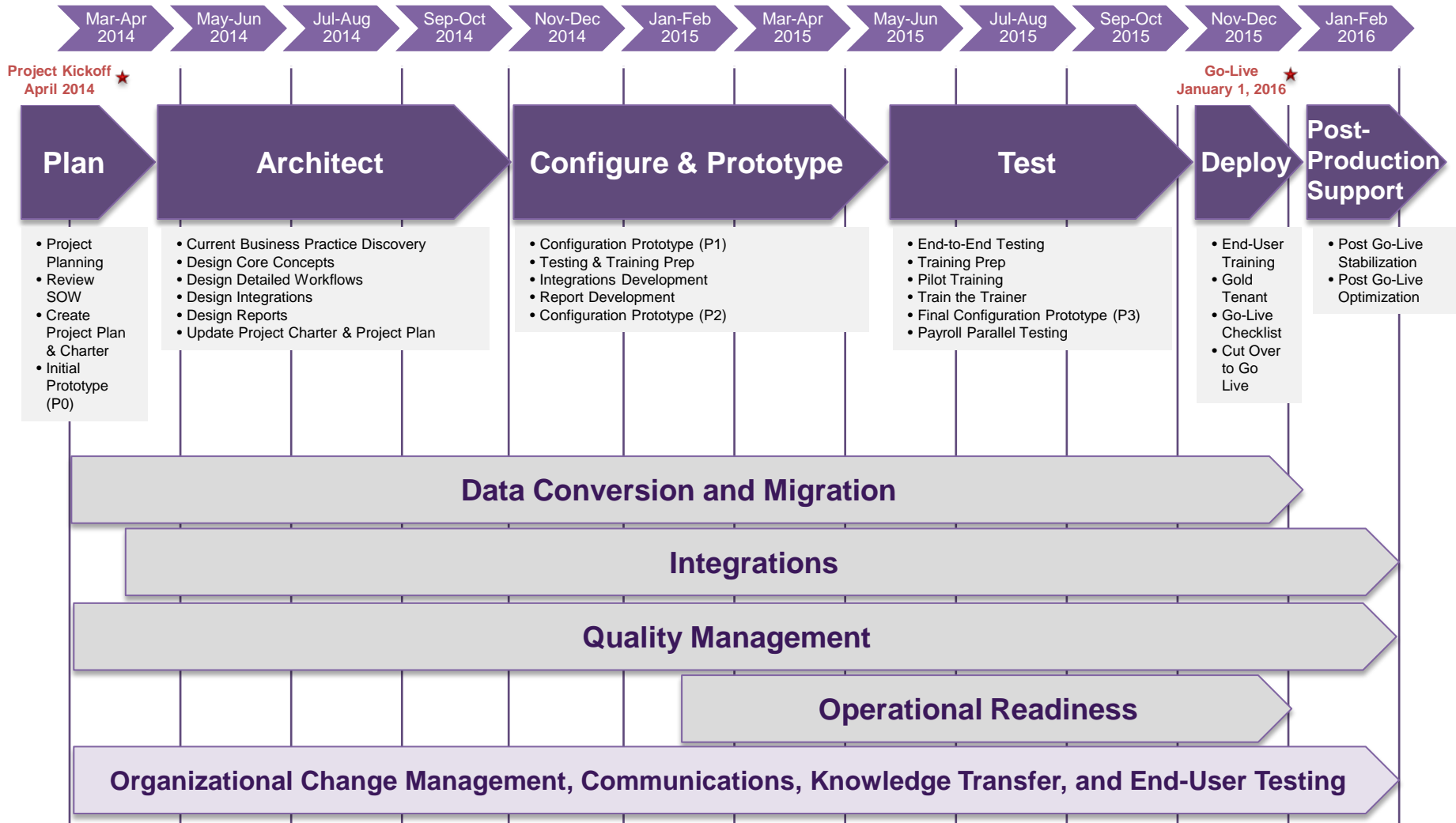
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# **NEXT STEPS & TIMELINE**

# Status & Next Steps

- Presented recommendation to Board of Regents last week
- Return to Regents for approval on Feb. 13
- State CIO's Office also must approve
- Implementation to start in March
- Planning for “go live” in early 2016

# HR/P Implementation Timeline



A large, ornate brass armillary sphere is suspended from a chain, hanging in a grand, vaulted ceiling. The sphere is composed of several concentric rings representing celestial objects like the ecliptic and the celestial equator. The background is a warm, golden-yellow color with a subtle pattern of the sphere's rings.

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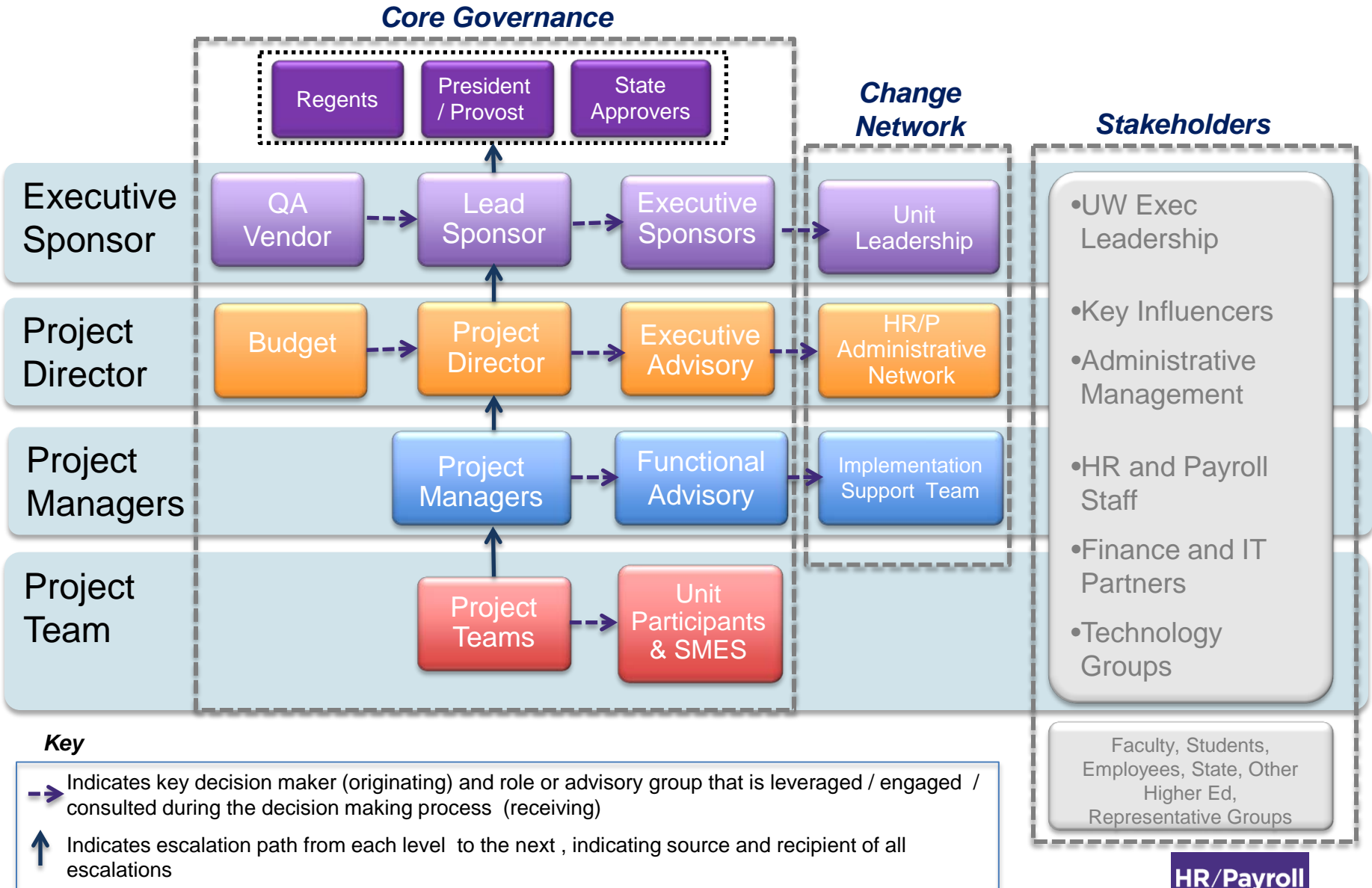
# **IMPACT ON RESOURCES & CHANGE NETWORK**

# Impact on Resources

- Work impact to departmental resources will vary
- Outreach to key audiences is underway
- HR/P Change Network is in place
  - Designated representatives in each unit
  - Will identify task-specific resources from each unit to help on project activities
- Upcoming requests for help include:
  - Identify system owners/operators to attend a February workshop with the HR/P technical team
  - Confirm availability of requested functional SMEs to participate in design sessions beginning in May (includes Benefits, Compensation, HR, Payroll, Time & Absence functional areas)



# Broad Engagement Model





# Change Network

## Unit Leadership

The visible support of Unit Leadership is critical to promoting the adoption of changes throughout the UW and providing legitimacy to the activities of the UW Administrator Network. They're responsible to:

- Promote Project Activities
- Promote Cooperation of Unit Staff
- Support the Unit Administrator

## HR/P Administrative Network

The HR/P Administrative Network is the heart of the Change Network and comprises unit-level leaders and administrators across UW.

They're responsible to:

- Serve as primary point of contact for their unit
- Champion the project within the UW community
- Support execution of project activities
- Provide guidance and unit oversight to Implementation Support Team

## UW Implementation Support Team

The UW Implementation Support Team is critical to support implementation activities on the ground-level, throughout departments across UW. The team comprises individuals selected by the Administrative Network member. They are responsible to:

- Support the Administrative Network participants
- Support project change activities
- Support project implementation activities
- Work with and receive direction from the HR/P team

# HR/P Administrative Network Membership

Unit	Name
Advancement	Christina Chang
Arts and Sciences	Linda Nelson
Attorney General	Dawn Glinsmann
Built Environments	Rachel Ward
Business	Kate Bouchard
Business	Pam Grindley
Center for Commercialization	Sara Burmeister
Dentistry	Jean Garber
Education	Roberta Hilton
Educational Outreach	Jennifer Buck
Educational Outreach	Laura Bohaty
Engineering	Lisa Drechsler
Environment	Darlene Feikema
External Affairs	Kathryn Daughhetee
Finance and Facilities	Barbara Wingerson
Graduate	Gary Farris
Health Sciences Admin	Bob Ennes
Human Resources	Evelyn Harris
Information	Mary Clark
Law	Julie Straub Barreto
Law	Paula Johnson
Libraries	Patrick Osby
Medical Centers	Darren Layman

Unit	Name
Medical Centers	Karen Odle
Medical Centers	Pam Palagi
Medical Centers	Paula Minton Foltz
Medical Centers	Walter Thurnhofer
Medicine	Randi Wasik
Minority Affairs & Diversity	Jan Kendle
Nursing	Chesca Ward
Pharmacy	Christene James
Planning and Budgeting	Amy Floit
President's Office	Evelyn Dunagan
Provost Office	Kim Dinh
Public Affairs	Linda Lake
Public Health	Lawrie Robertson
Public Health	Ben Robinson
Research Office	Debbie Flores
Social Work	Vicki Anderson-Ellis
Student Life	Amy Kim
Undergraduate Academic Affairs	Judi Gray
UW Bothell	Denise Rollin
UW Tacoma	Richard Wilkinson
UW-IT	Bill Ferris
UW-IT	Susan Lawrence

Questions?

**HR/Payroll**

MODERNIZATION

UNIVERSITY *of* WASHINGTON

# UW-IT Portfolio Prioritization Process

# FY 2014 Portfolio Review Outcomes

- Decision to hold two projects -- eF ECS and MyFD
- Seek funding for top two priorities -- 40G Network and Undergraduate Modernization
- Use ranking process priorities to guide project resource allocations when conflicts arise
- Improved transparency and understanding of UW-IT capacity and resource challenges
- Improved ability to identify dependencies and synergies across projects
- Lessons learned will improve and streamline FY 2015 process

# FY 2015 Portfolio Review Process

- Start in January 2014 to align with UW-IT and UW budget processes
- Improved and streamlined process
  - Based on input from this Board and UW-IT Project Review Board
  - Revised criteria, scoring methodology and business case proposal template
- Rank by Service Categories
  - Strategy Board to identify Service Category allocations at February 3 meeting
  - Review with this Board at March 3 meeting

# FY 2015 Portfolio Prioritization Timeline

Date	
February 10 – 27	UW-IT Project Review Board proposal ranking
March 3	SIB meeting <ul style="list-style-type: none"><li>• Review Strategy Board recommendations for portfolio allocations by Service Category</li><li>• Review ranking process</li></ul>
March 7	Proposal ranking begins
April 4	Rankings due
April 21	SIB meeting <ul style="list-style-type: none"><li>• Stakeholder presentations</li><li>• Review and discusses ranking results</li></ul>
April 21 – May 12	Re-rank projects (due May 12)
May 23	SIB meeting: Review and finalize ranking results

# Revised Criteria - Importance

## Strategic Value

- Does this project improve the University's academic or research excellence?
- Does it improve the UW's competitiveness by helping to attract the best students, faculty, and staff or by increasing and diversifying funding?
- Does it enhance interdisciplinary collaboration in research, instruction, or other University efforts across organizational, regional, or global boundaries?

## Impact

- Does this project improve the personal productivity or experience of students, faculty, or staff (i.e., individual end user of system or service)?
- Does it benefit a large number of UW students, faculty, or staff?
- Does it improve administrative efficiency or reduce overall administrative costs for the University (and not by shifting costs to units)?

## Risk

- Does this project help sustain and strengthen core IT operations, mitigate operational risk, or ensure key services are resilient?
- Does it address compliance, financial, or information security and privacy risk?



# Revised Criteria – Likelihood of Success

- Does UW-IT have staff resources available to support this project?
- Does this project require minimal contributed resources from other divisions?
- Does this project carry minimal risks related to an outside vendor or contractor?
- Does this project have funding for implementation? (Not including UW-IT contributed effort.)
- Does this project have funding to sustain this service on an ongoing basis? (Not including UW-IT contributed effort.)
- Does this project align with [UW-IT's enterprise architecture strategy](#)?

# Revised Business Case Template

**[BUSINESS CASE: [INSERT PROJECT NAME]]**

*Note: Name should be short, and convey a clear idea of what the project is to a non-technical audience*

**PROJECT SUMMARY**

*Please provide a brief one or two sentence description of the project.*

**KEY OBJECTIVES AND BENEFITS**

*Please provide a short, concise description of the main objectives and benefits of the project. Please address:*

- Key objectives of the project (what is it trying to achieve?)
- Main benefits of the project (i.e. what problem does it solve or value does it create?)
- Who will benefit
- Key deliverables. If this is part of a larger program, please provide a description of the program (and a link if appropriate).

*Note: The IT Service Investment Board will prioritize the project based upon this business case, so please provide a clear, concise and compelling business case that can be quickly and easily understood by a non-technical audience.*

**Is the end result a customer-facing tool or service?** Yes  No

**TIMELINE ESTIMATE**

**Estimate of Project Duration (#of Months):** \_\_\_\_\_ **Start date (Month, Year):** \_\_\_\_\_

**BUDGET ESTIMATE – complete the yellow boxes (double-click)**

	Implementation		Ongoing (Annual)	
Contributed Lab or (# of Hours @ \$107):		\$ -		\$ -
New Labor (# of FTE @ \$135,000/yr):		\$ -		\$ -
HW/SW/Other non-Lab or Expenses:		\$ -		\$ -
<b>Total:</b>		\$ -	<b>Total:</b>	\$ -

**FUNDING**

**How will this project be funded?** (check all that apply)  Existing UW-IT Budget  Provost  Self-sustaining grant, other

**Are the funds for this project already committed?**

Implementation:  Yes  No  Partially, explain: \_\_\_\_\_

Ongoing (annual):  Yes  No  Partially, explain: \_\_\_\_\_

**PROJECT DEPENDENCIES**

*Identify any other projects that this project is dependent upon to be successful.*

**PRIORITIZATION CRITERIA**

*The PRB and the IT Service Investment Board will prioritize UW-IT's Project Portfolio based on the **impact** to the UW. The following criteria will be used in the prioritization process. If the project does not support any particular criteria, please leave that item blank. Please see addendum on Criteria for additional information.*

**Note: To save space, you may delete all the text in italics once the proposal is complete.**

**1. Strategic Value**

*Please describe how this project directly contributes to the mission, strategy, and goals of the UW by addressing each of the following questions (insert your answer below each question, and keep your answers brief, no more than 75 words per question).*

# Questions & Discussion