IT Service Investment Board

April 21, 2014

Agenda

- UW-IT Portfolio Scoring Process

- Scoring Results

- TRF Update

- Wrap Up

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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

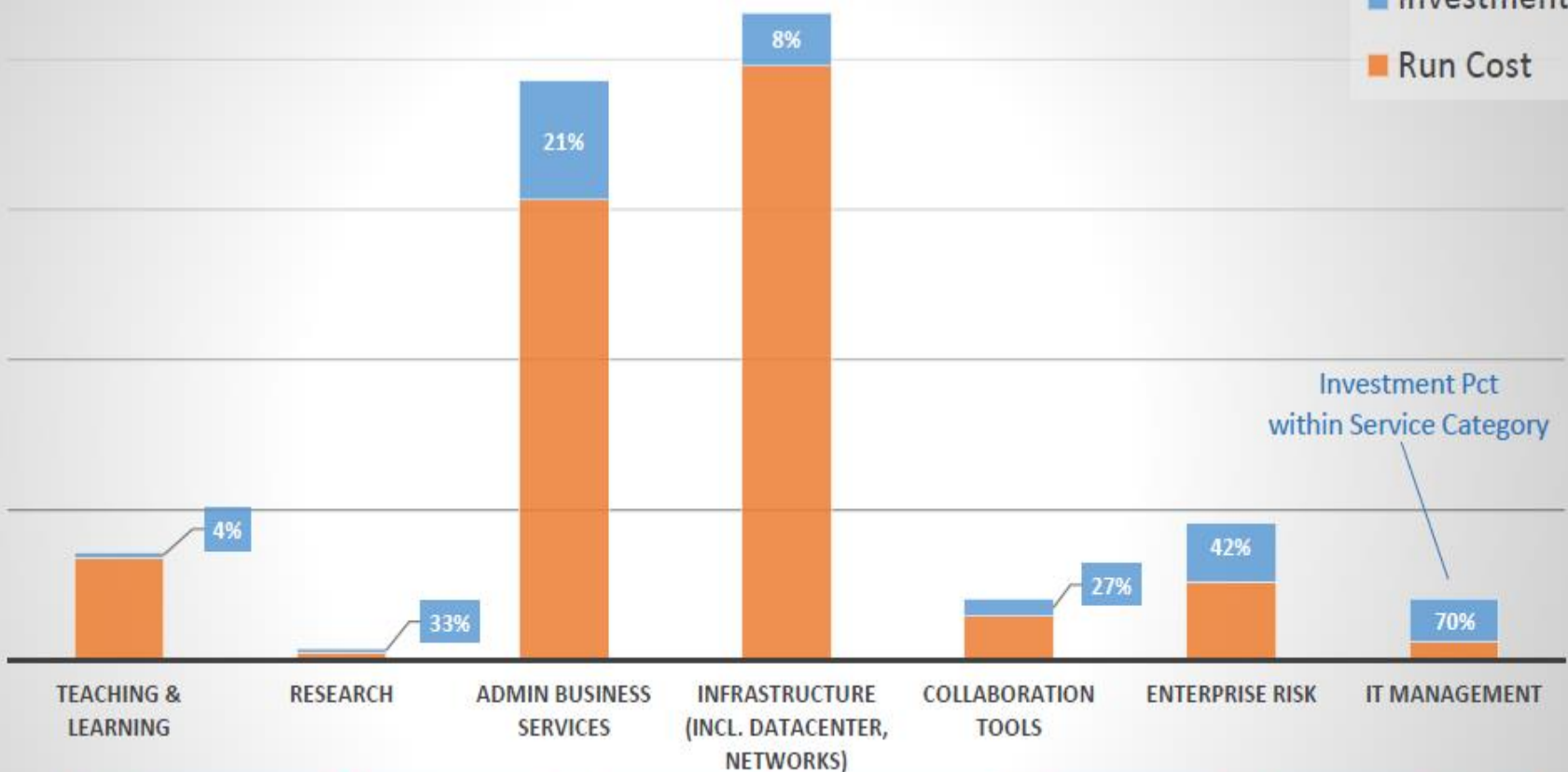# Service Categories

- 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[†]

Legend:
- Investment (blue)
- Run Cost (orange)

Investment Pct within Service Category

Category	Investment	Run Cost
TEACHING & LEARNING	4%	
RESEARCH	33%	
ADMIN BUSINESS SERVICES	21%	
INFRASTRUCTURE (INCL. DATACENTER, NETWORKS)	8%	
COLLABORATION TOOLS	27%	
ENTERPRISE RISK	42%	
IT MANAGEMENT	70%	

	TEACHING & LEARNING	RESEARCH	ADMIN BUSINESS SERVICES	INFRASTRUCTURE (INCL. DATACENTER, NETWORKS)	COLLABORATION TOOLS	ENTERPRISE RISK	IT MANAGEMENT
Category Spend	7%	1%	36%	40%	4%	9%	4%
Investment Allocation	1%	1%	40%	18%	6%	19%	14%

†Expenditures from first half of year, annualized

*Labor only 6

Timeline - FY 2015

January, 2014	Business Case development
February	PRB scoring and ranking (all)
March	SIB scoring and ranking (~10-12)
April	SIB review results and discussion (initial)
May	SIB second scoring (if warranted) Final discussions and recommendations

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

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Teaching & Learning

Academic Explorer

MyHusky Experience - Implementation

Curriculum Management - Build Out

Ideas

| Courses |
| Programs |

| Learning Unit |

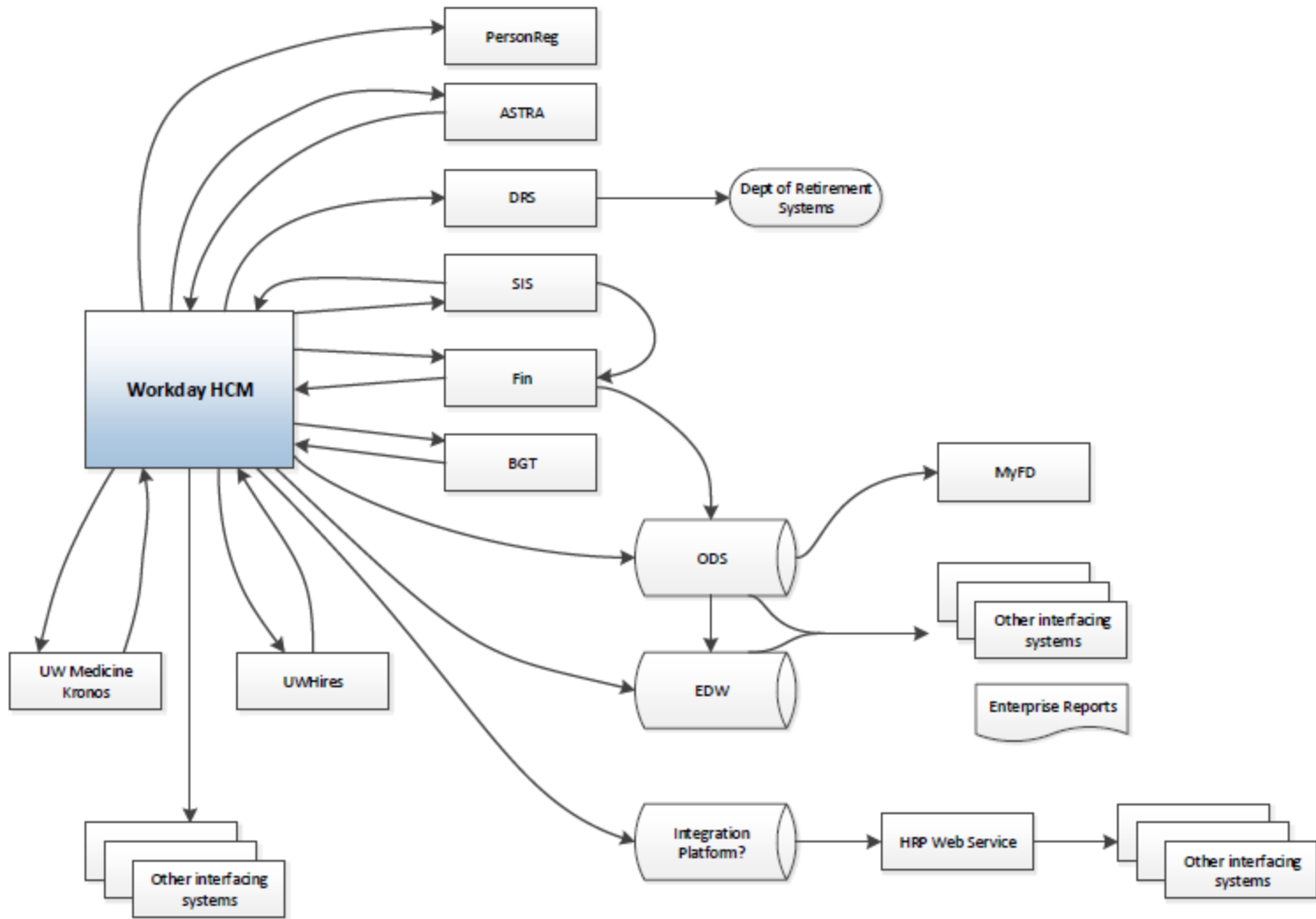| Create |
| View |
| Modify |
| Retire |
| Group |
| Analyze |

Catalog

Administration/Business Systems

Seattle Undergraduate Admissions Modernization

University of Washington
Workday HCM Enterprise Integration

Enterprise Business Services Program - Startup

Request Intake

Business Architecture

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.
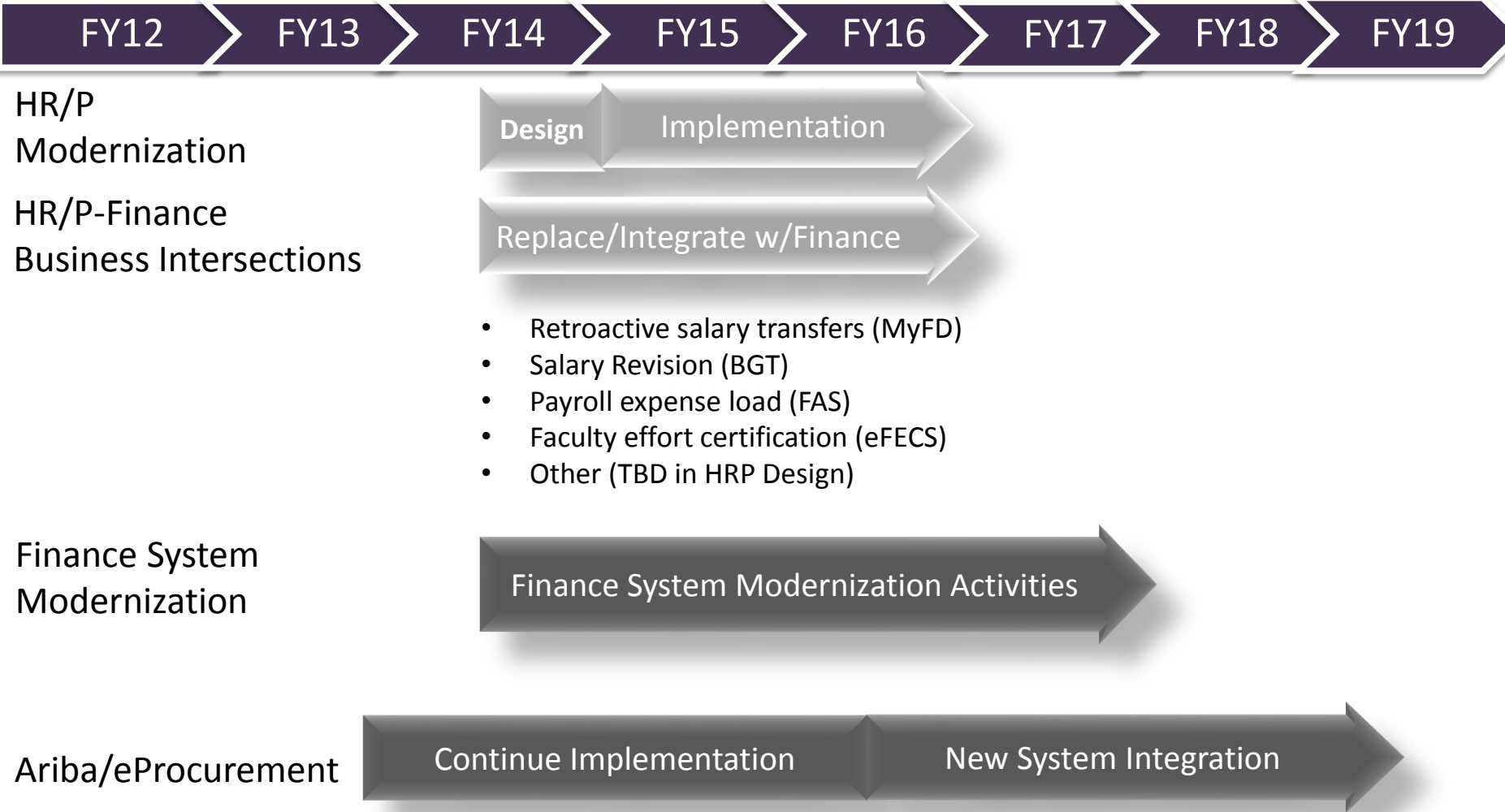- EDMS & AIS Staff trained to "pull" LEAN outcomes

Web Services/integration (AIS) 1 FTE
- Defined as workflow requirements associated with document/data utilized to streamline business process
- TBD – direct or indirect service
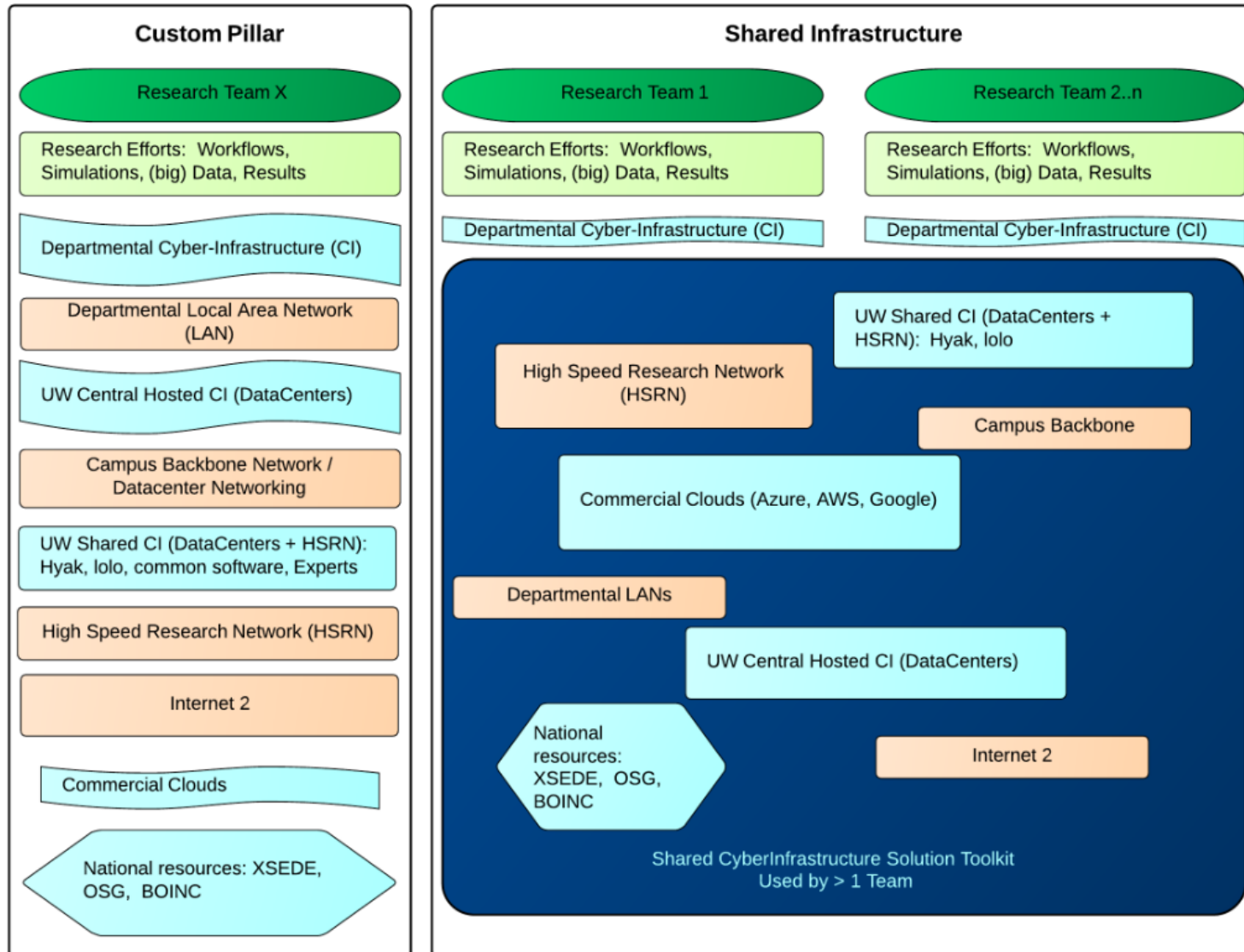
Web Forms/Applications & Notifications 1 FTE
- Canned forms that can be modified to provide a user interface for each step

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Financial Systems Modernization Roadmap

FY12 >	FY13 >	FY14 >	FY15 >	FY16 >	FY17 >	FY18 >	FY19 >

HR/P Modernization

Design | Implementation

HR/P-Finance Business Intersections

Replace/Integrate w/Finance

- 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

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Research

Storage, Consulting & Tools for Researchers

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

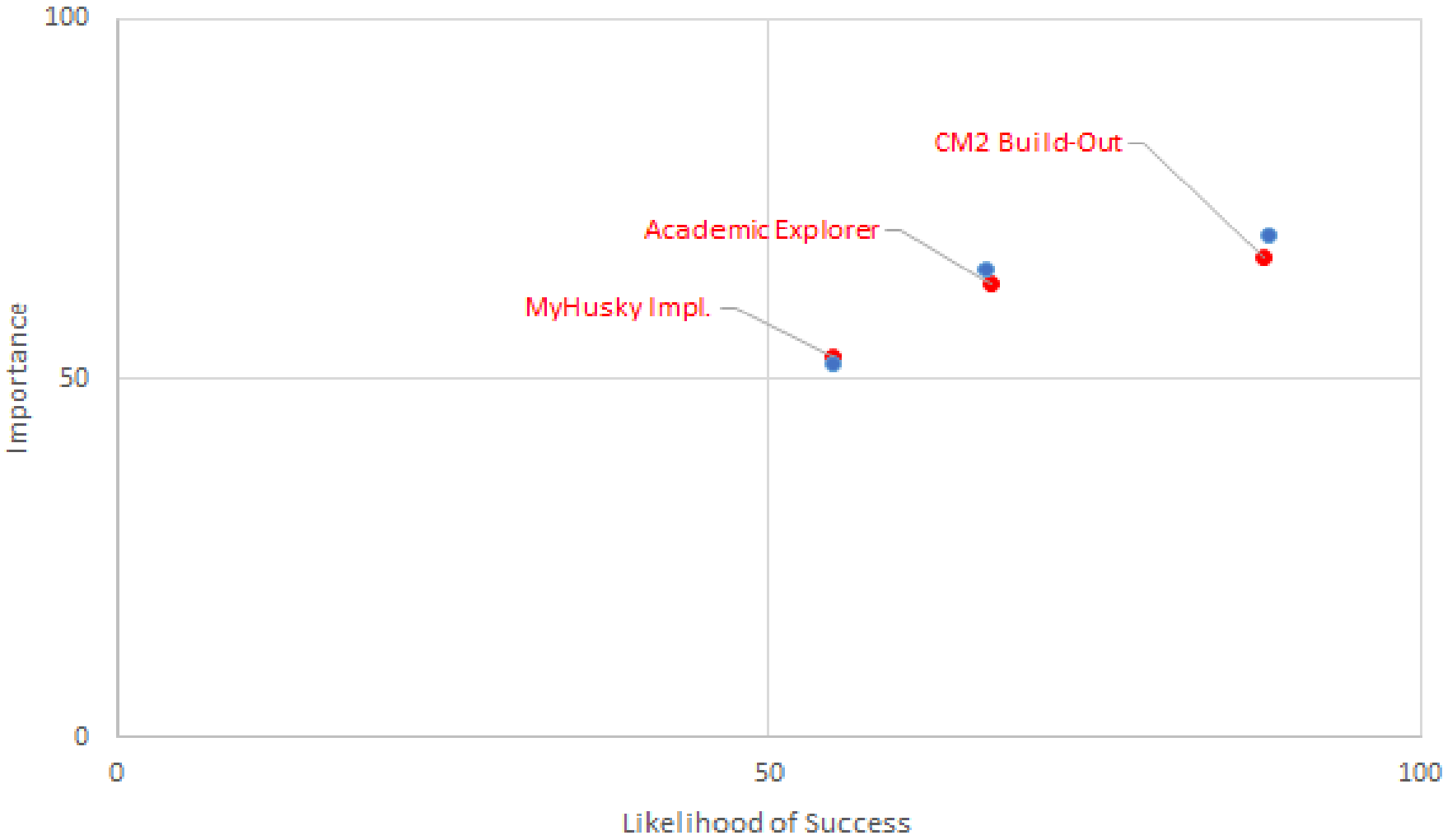| 1. Avaya Softphone	2. Voicemail Integration	3. Phone Integration: MS Lync 4. Phone Integration: Google Apps	5. Fax Server	6. Audio Conference Integration	7. Video Conferencing Integration

UW Telephone Core Infrastructure

UW Data Center
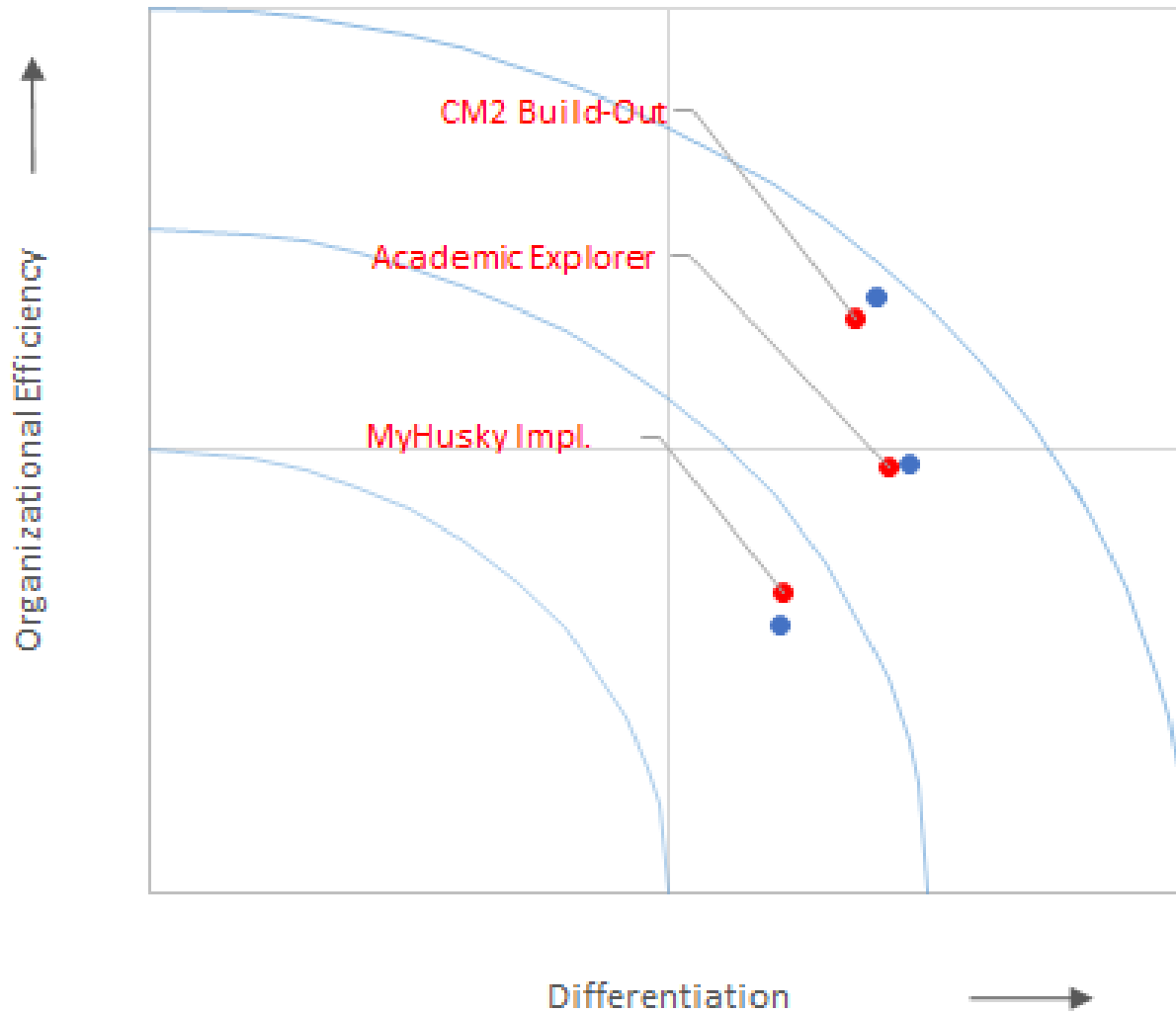
Scoring Results

Teaching & Learning
Basic Metrics
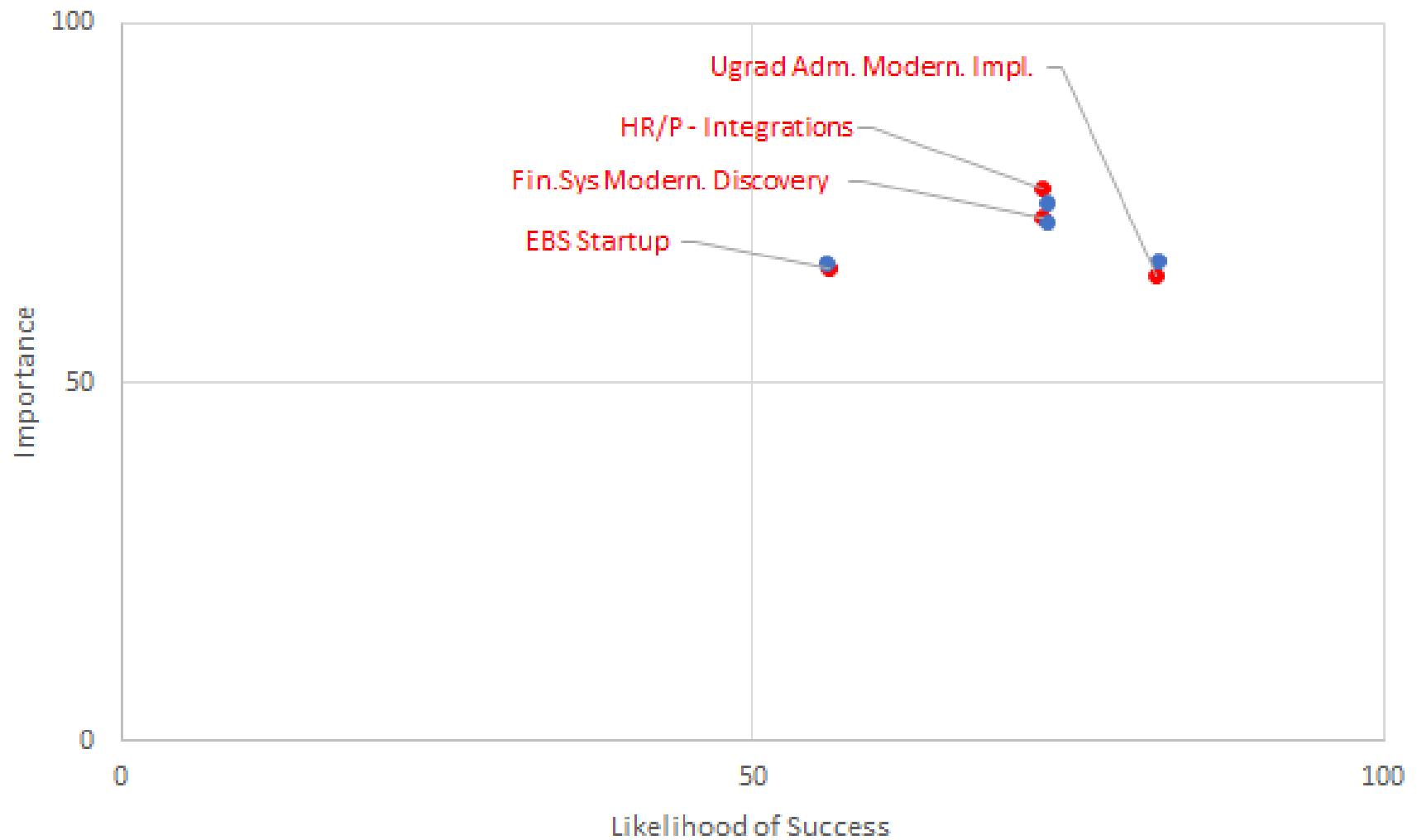
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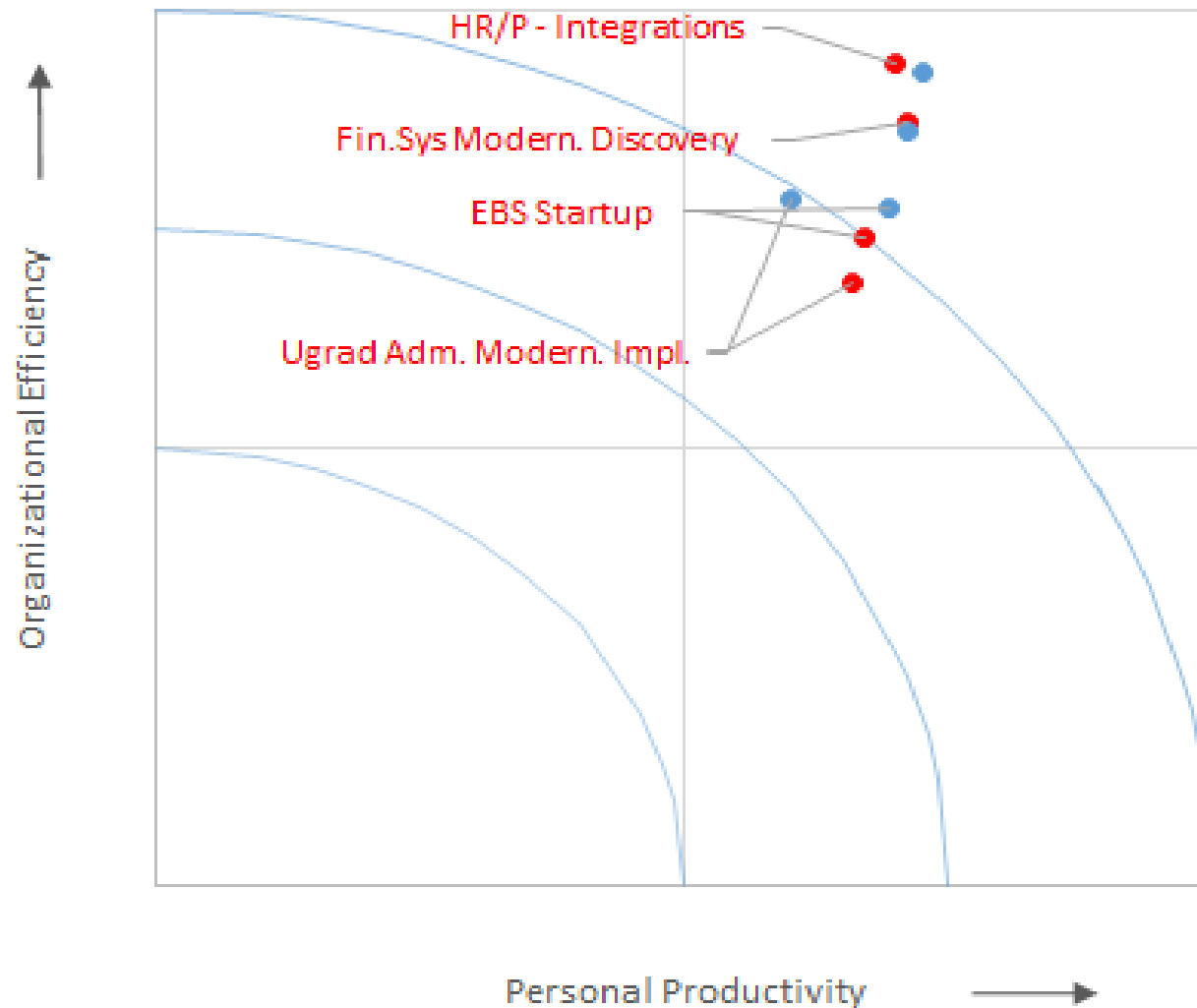
Teaching & Learning
Who Benefits?
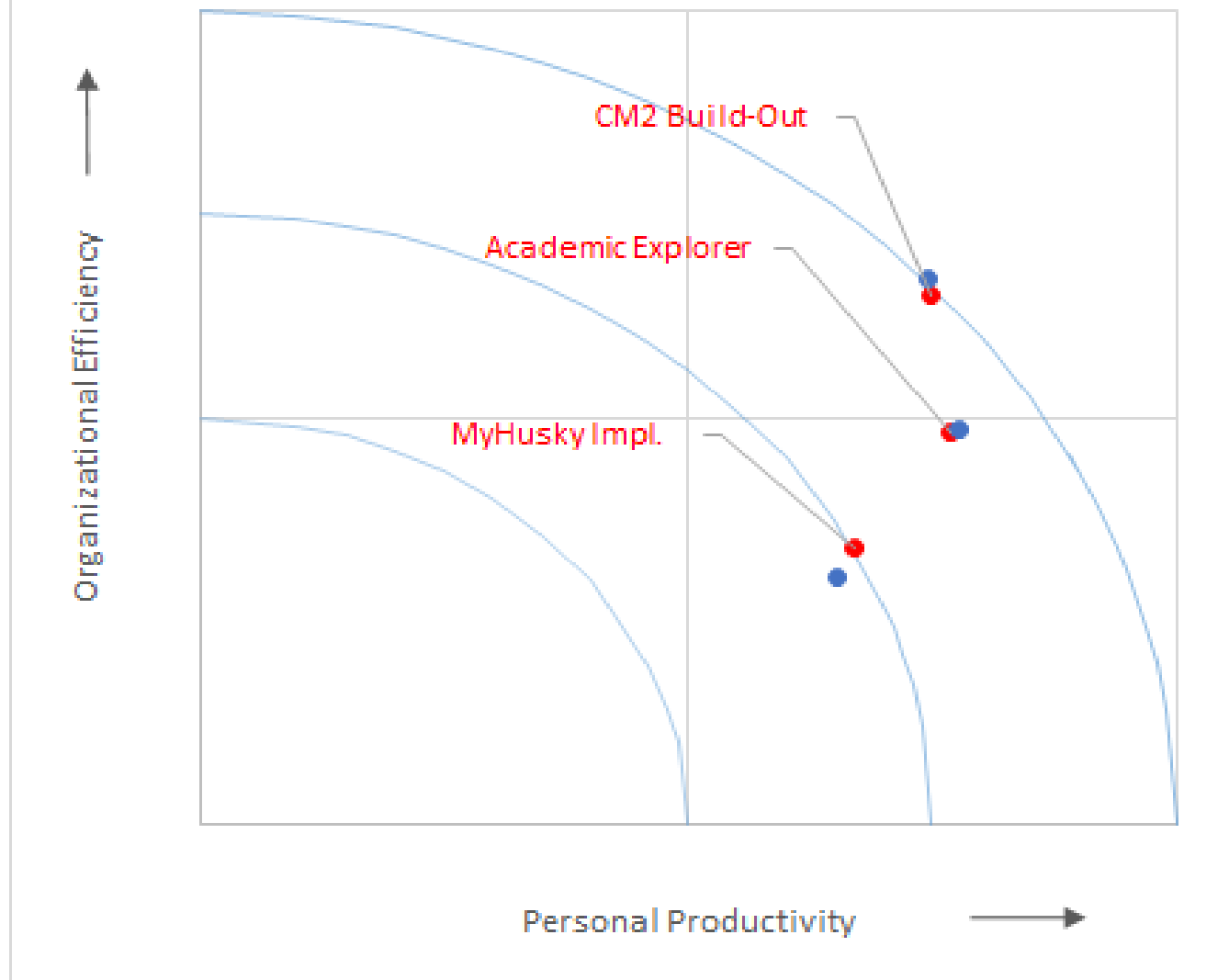
Teaching & Learning
Impact - Visible or Hidden?

Admin / Business
Basic Metrics

Admin / Business
Who Benefits?

HR/P - Integrations

Fin.Sys Modern. Discovery

EBS Startup

Ugrad Adm. Modern. Impl.

Organizational Efficiency

Personal Productivity

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Admin / Business
Impact - Visible or Hidden?

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Differentiation

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Research
Basic Metrics

Storage, etc. for Research

Importance

Likelihood of Success
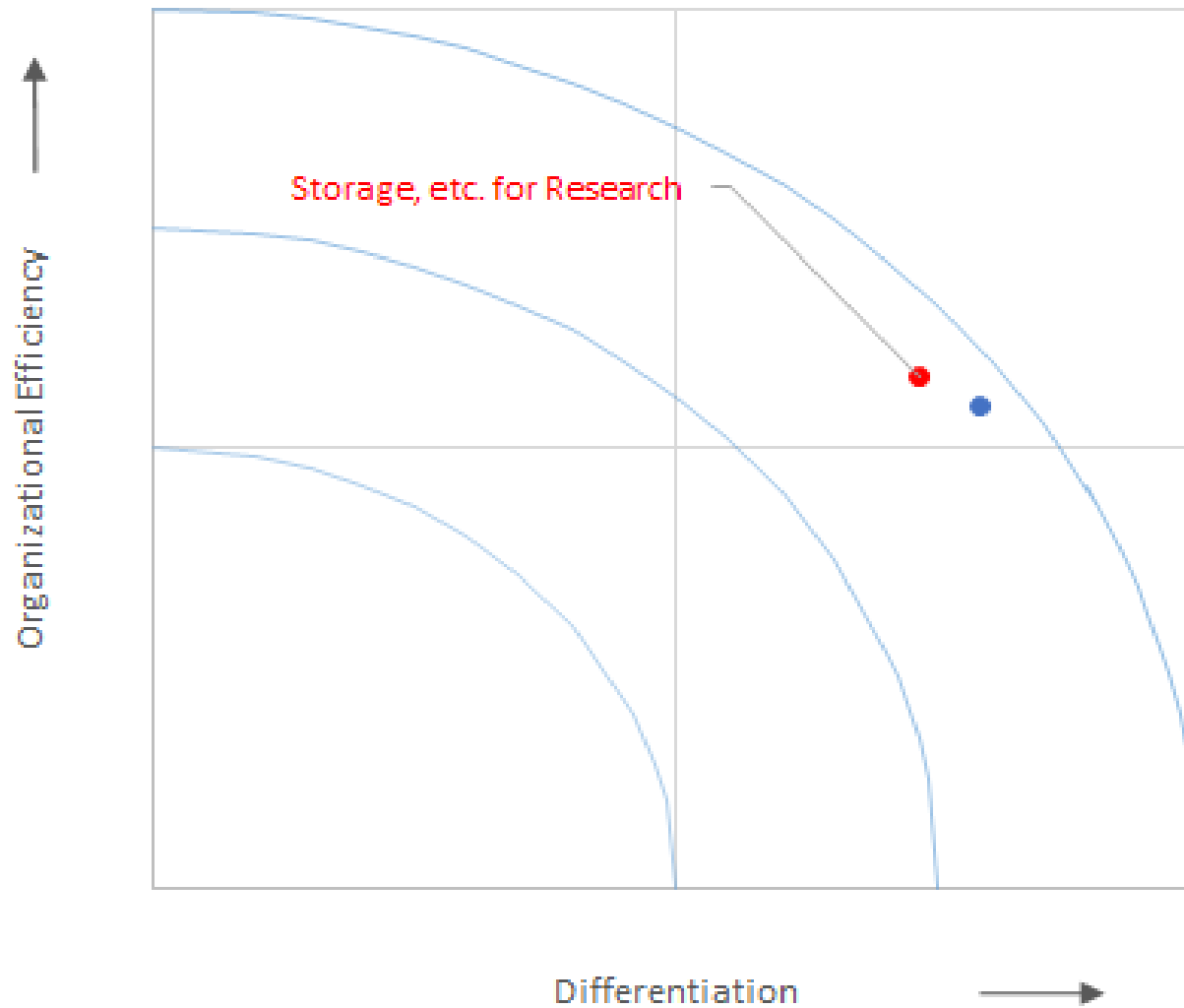
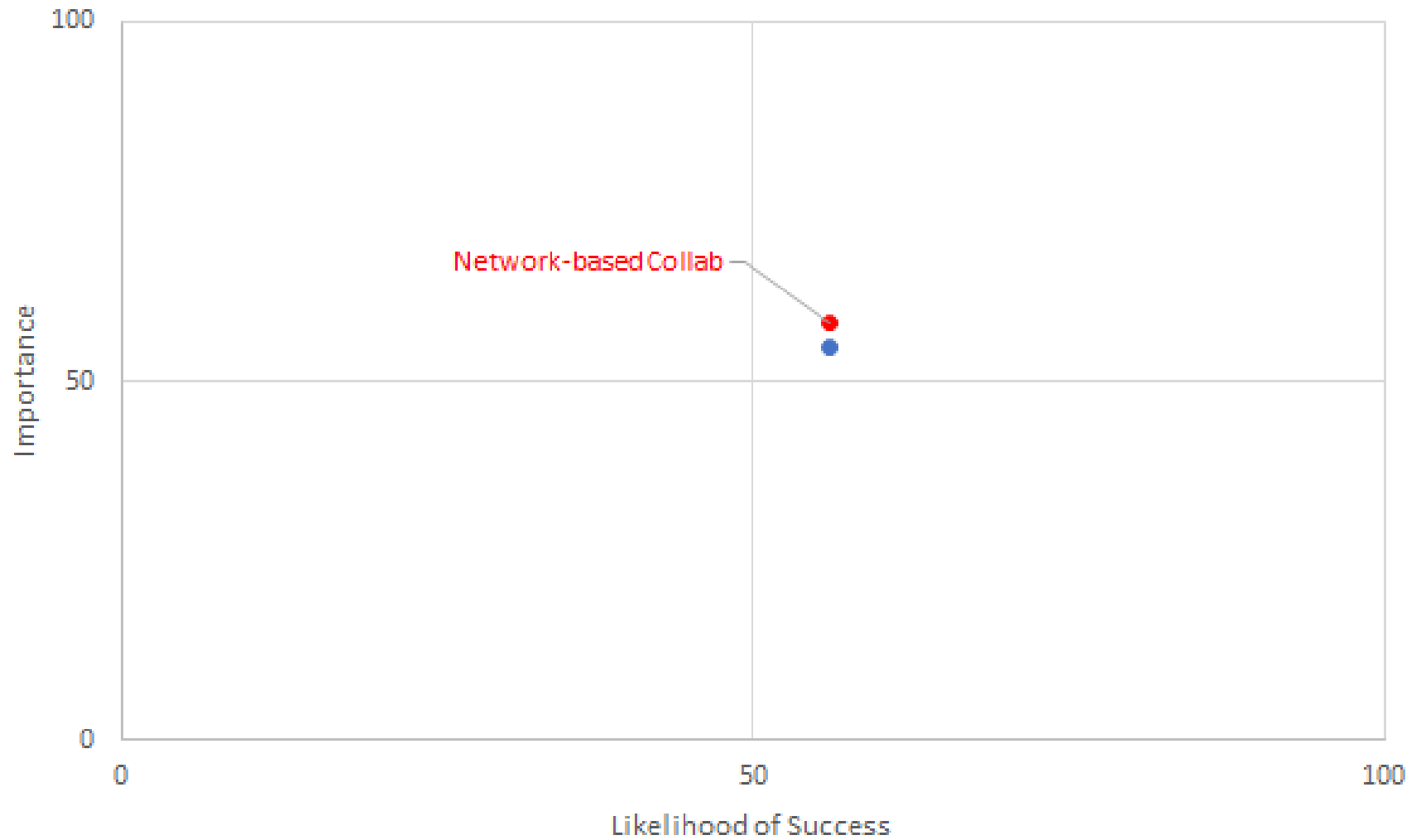UNIVERSITY *of* WASHINGTON
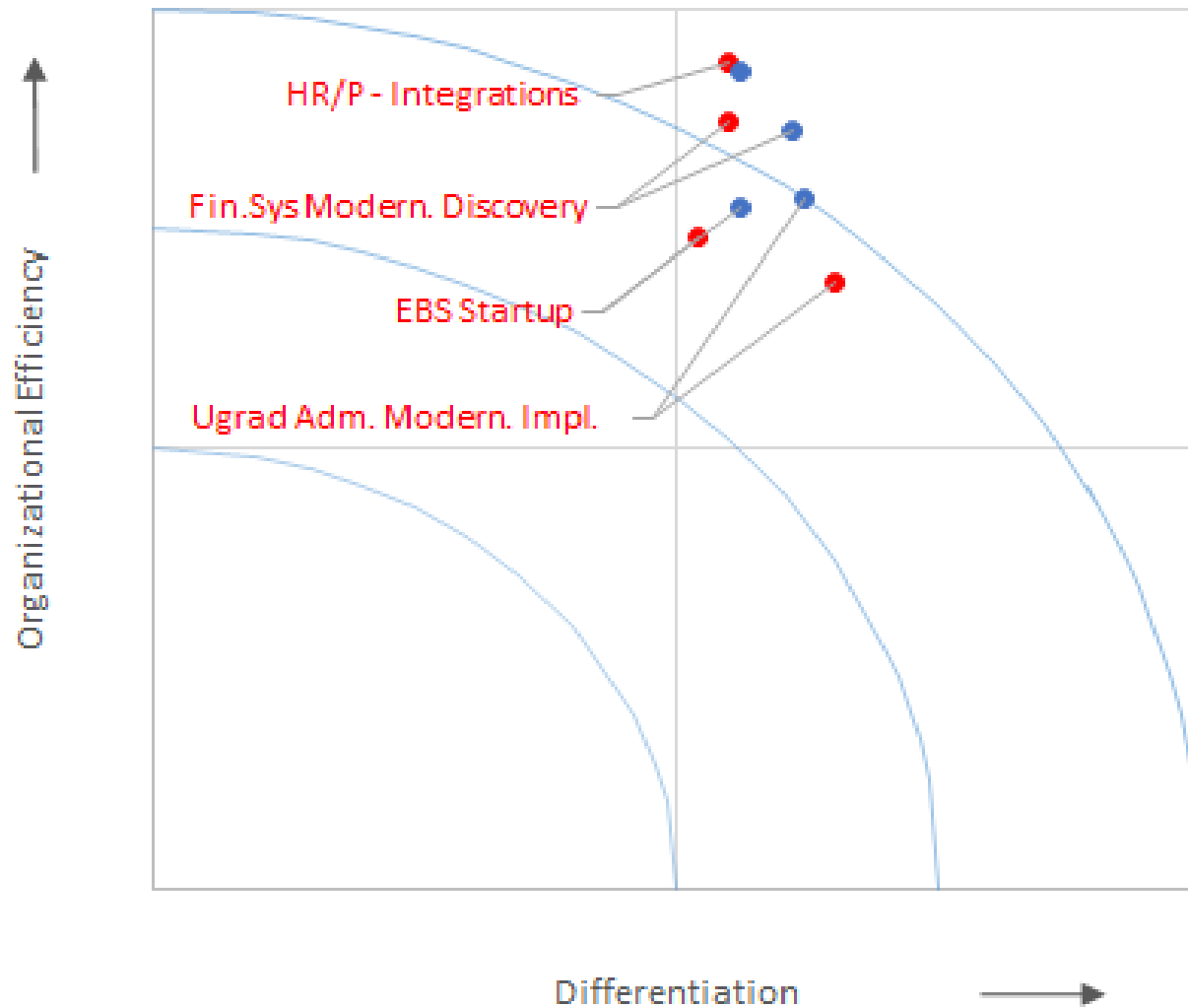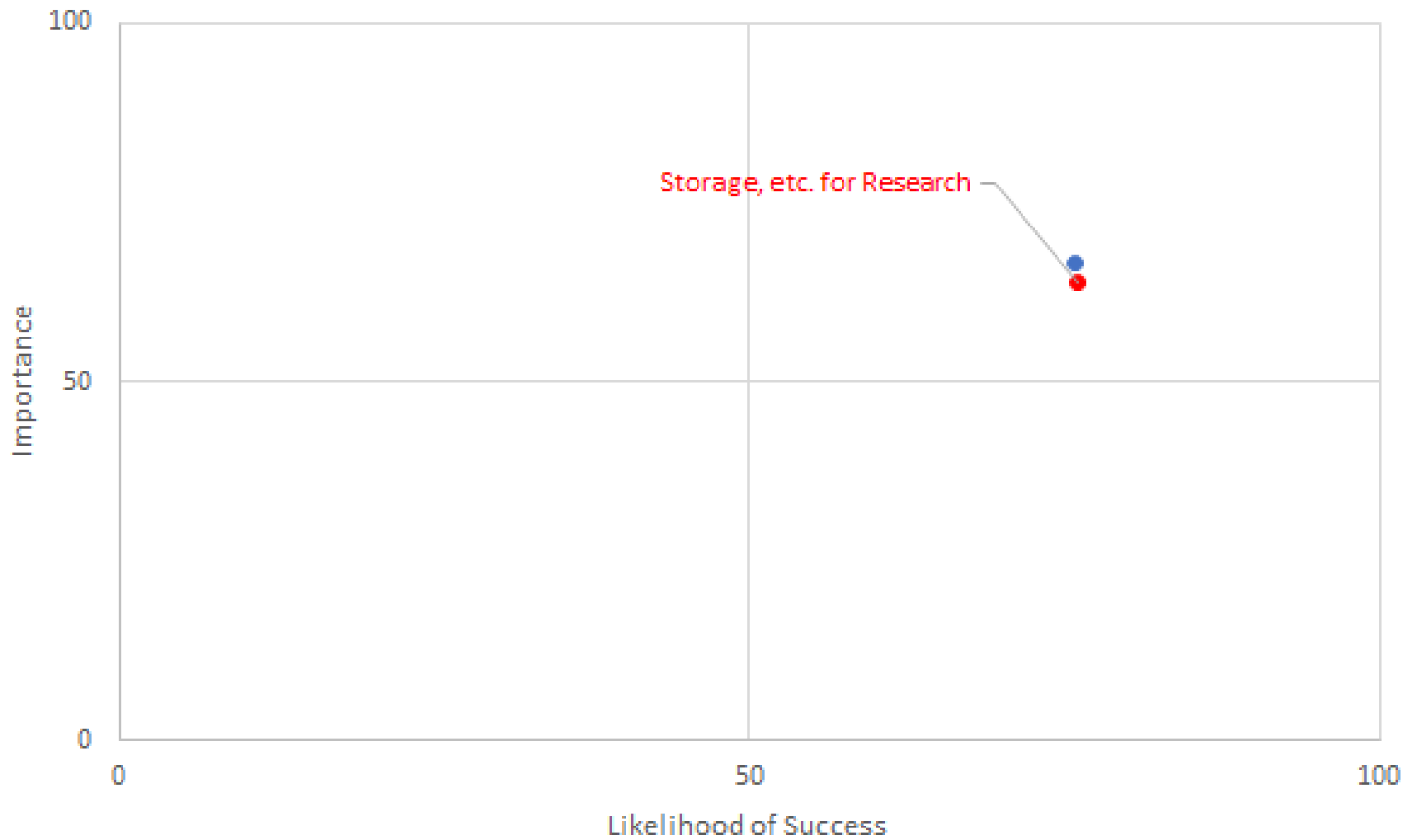
Research
Who Benefits?
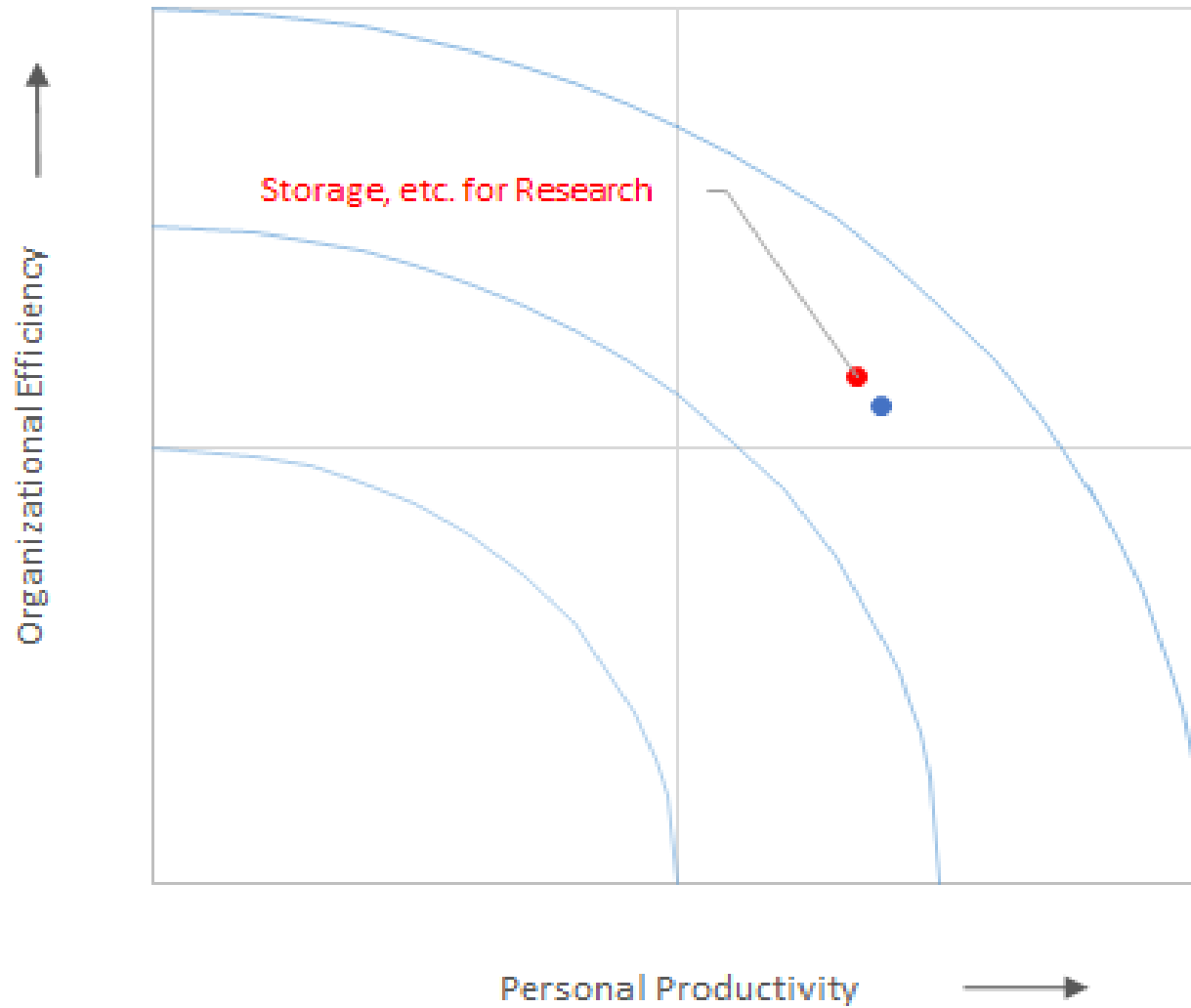
Research
Impact - Visible or Hidden?

Collaboration
Basic Metrics

Collaboration
Who Benefits?

Organizational Efficiency

Network-based Collab

Personal Productivity
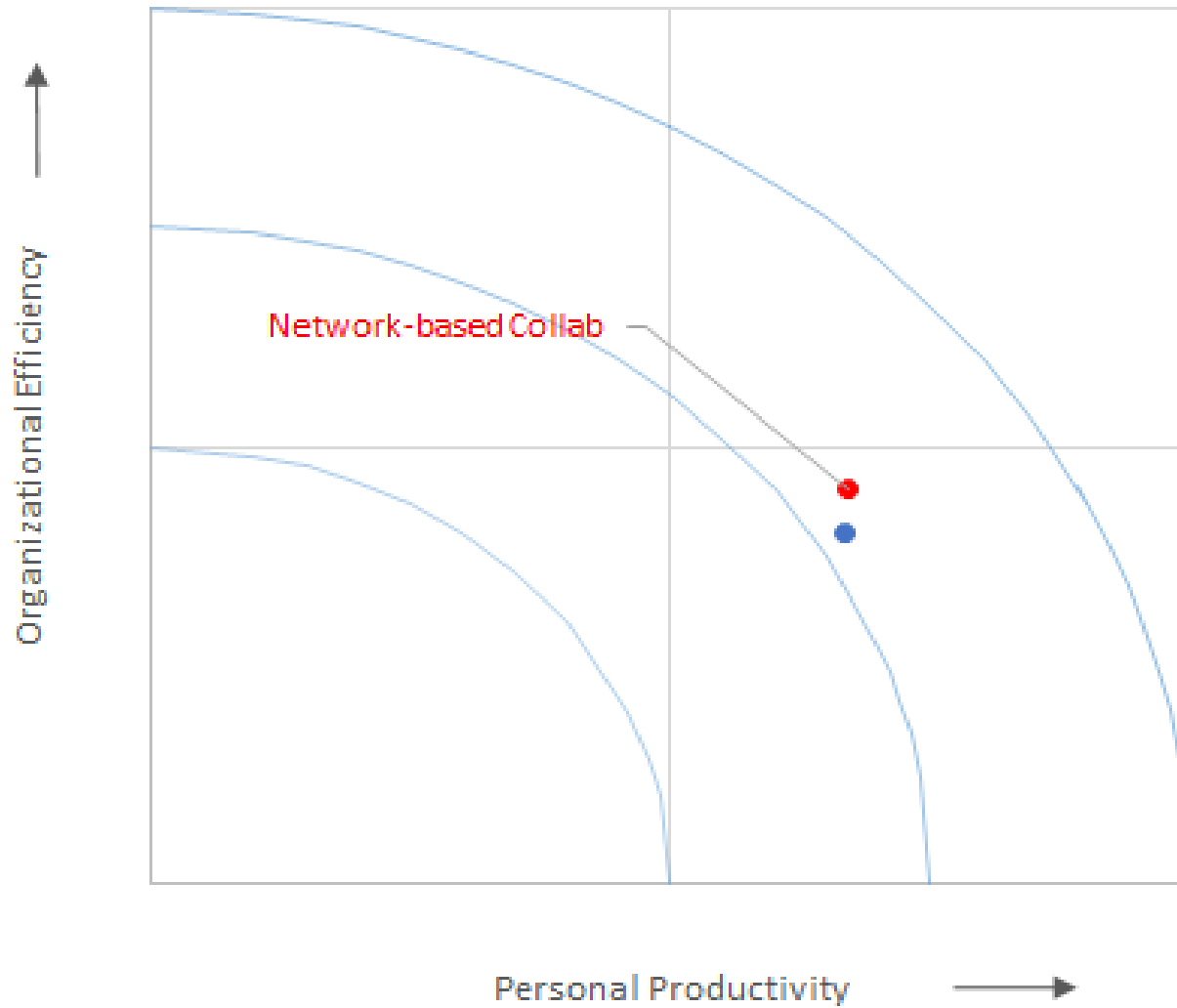
Collaboration
Impact - Visible or Hidden?

Organizational Efficiency

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Differentiation
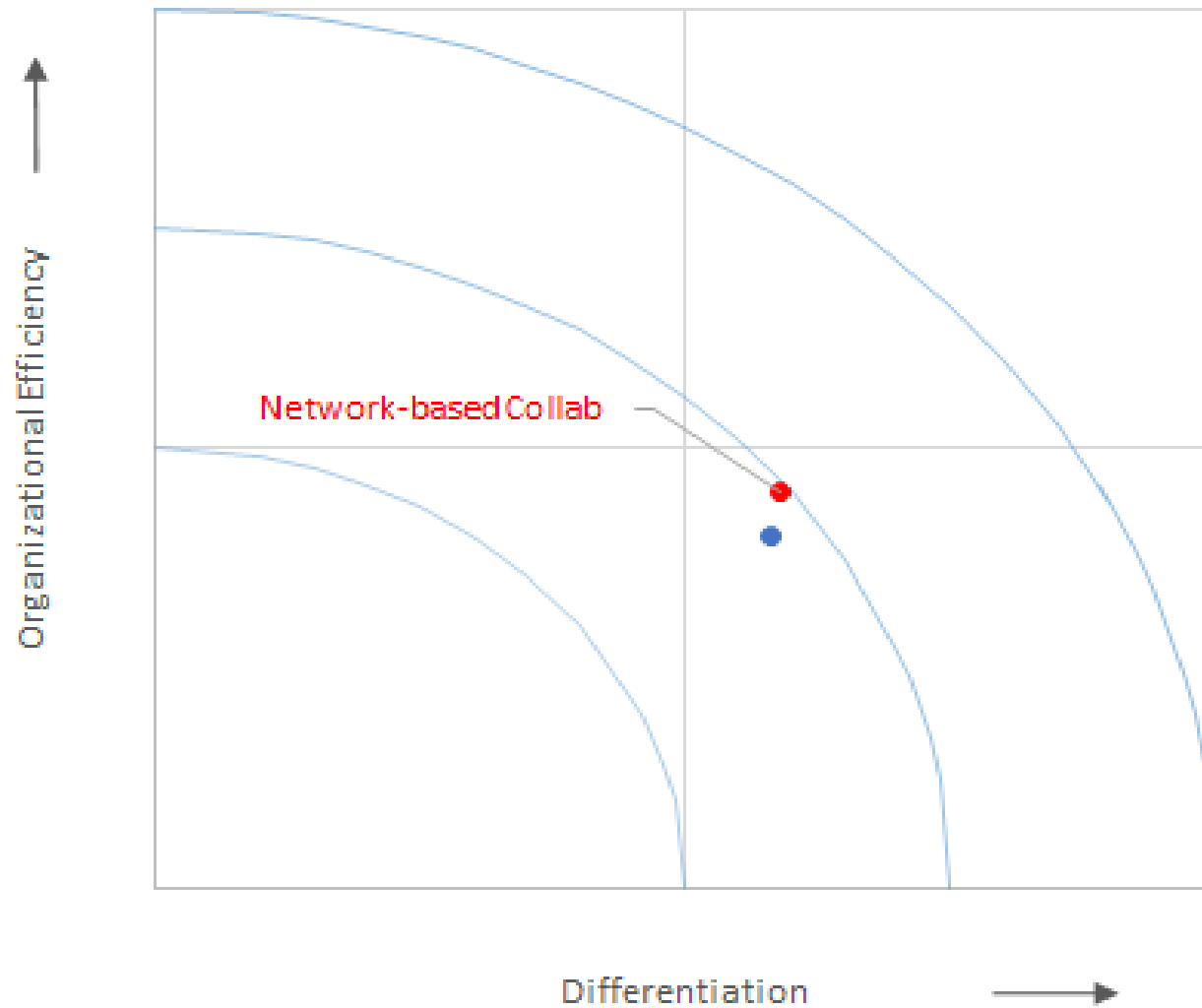
SIB Business Cases
Basic Metrics
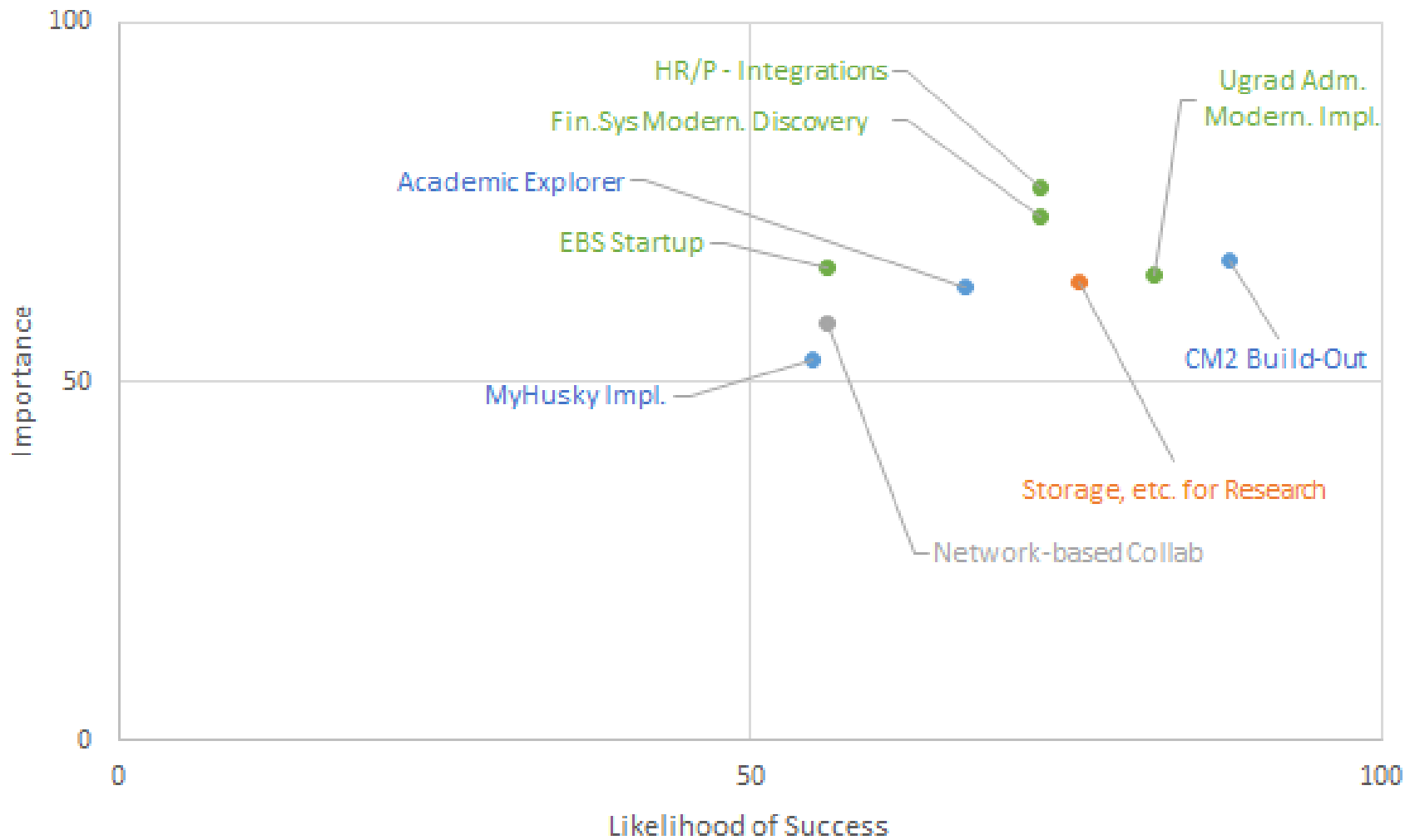
TRF Update

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 |

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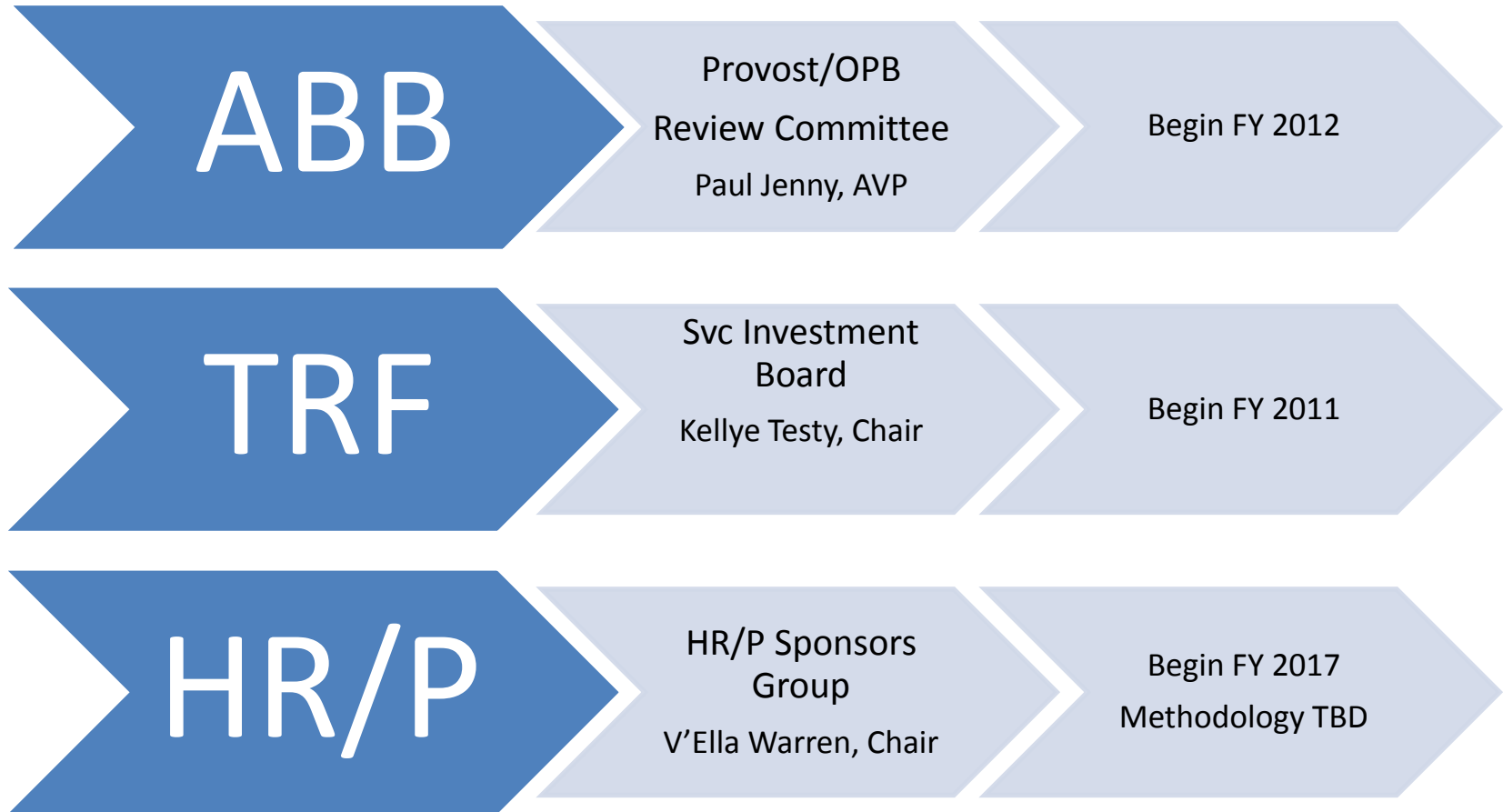
TRF Advisory Committee Timeline

- 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

Fairness Simplicity
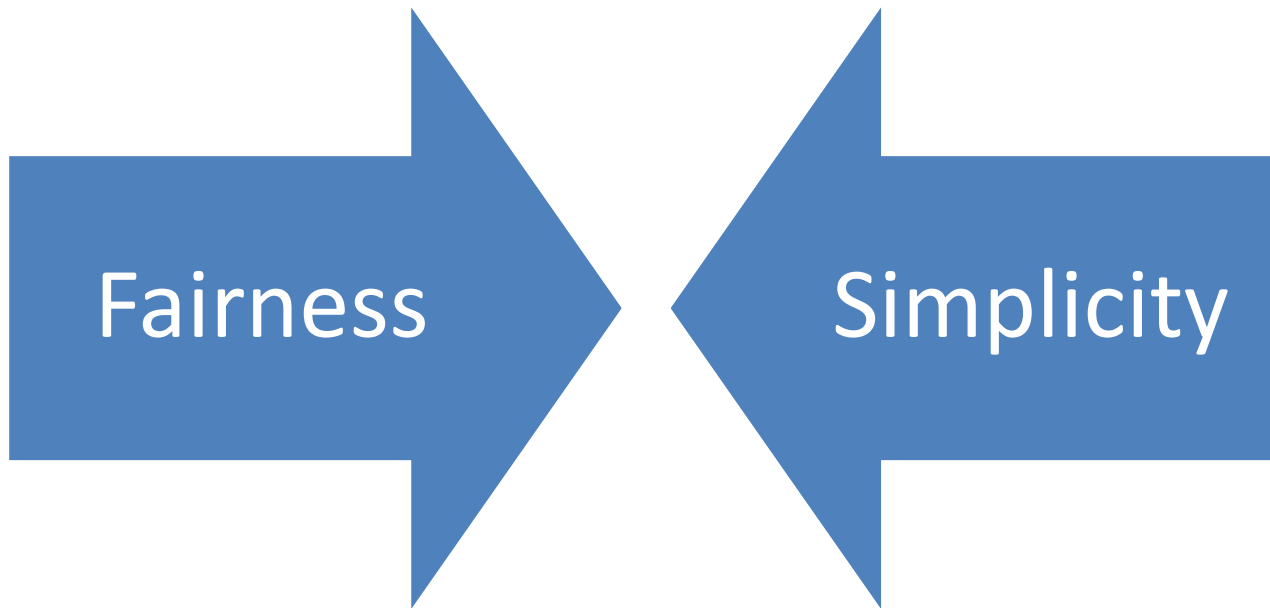
TRF Advisory Committee feels we are close to the right balance and current methodology is "equally unfair".

Challenge: Alignment of TRF with current UW-IT Org

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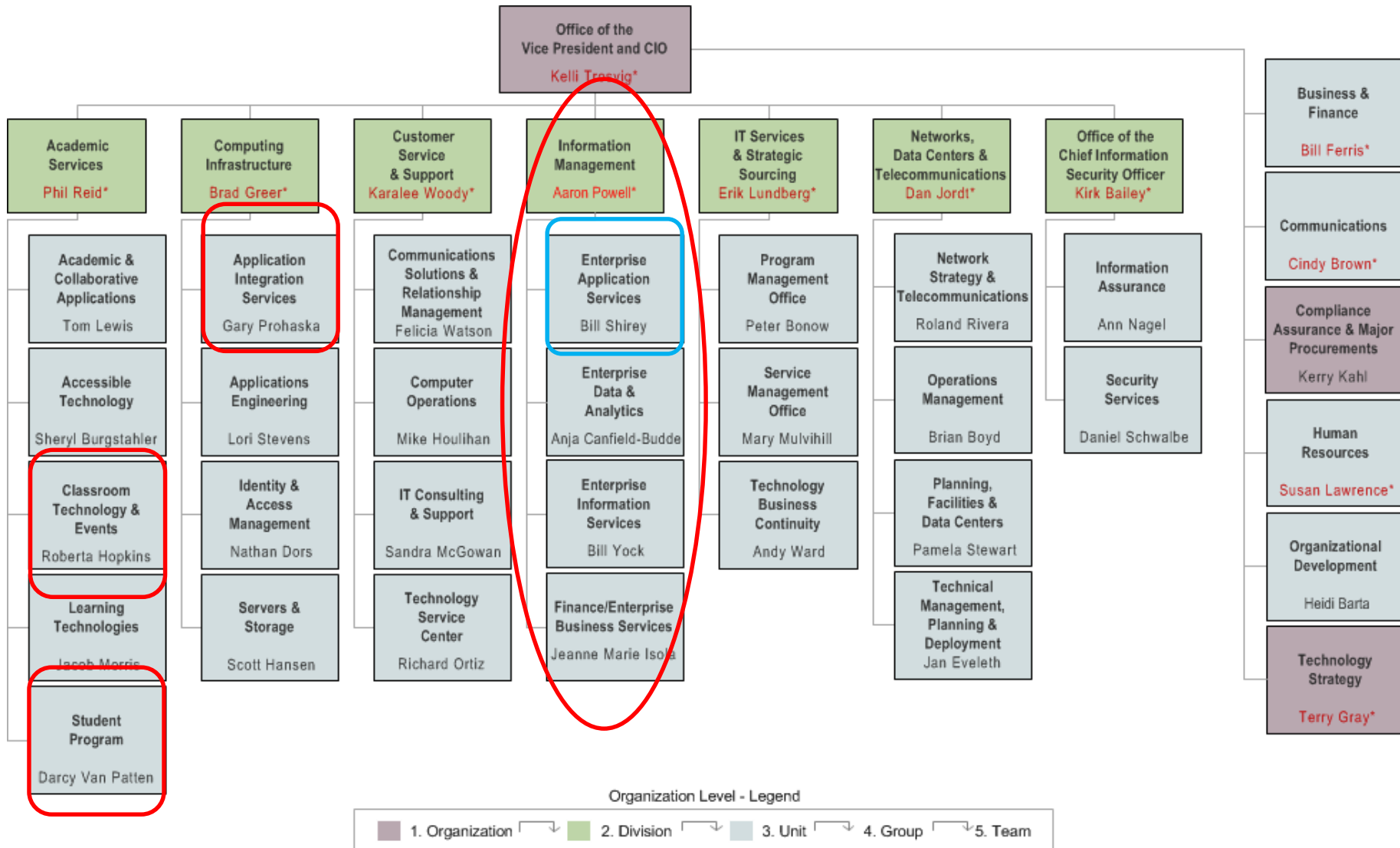
TRF Advisory Committee Outcomes – 4/7/14

- 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

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Questions & Discussion

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