October 26, 2012

Service Management Board Orientation

Appointment Letter

Dear Colleagues:

Thank you for agreeing to serve on the IT Service Management Board that is being established to review and make recommendations about the provisioning, delivery and management of services provided by the UW Information Technology (UW-IT).

The IT Services Management Board is **advisory to the Vice President for UW-IT and CIO** and is responsible for ensuring alignment of UW-IT services with institutional IT strategy and priorities, and for optimizing the design, delivery, operation and sourcing of those services. As part of its charge, the Board reviews major UW-IT services and makes recommendations for service life-cycle improvements, including changes and enhancements to service design, delivery, and operations that will improve the value of the service to the UW community. The Board also makes recommendations for information technology service Management process improvements efforts.

SMB - Role & Responsibilities

Dear Colleagues:

Thank you for agreeing to serve on the IT Service Management Board that is being established to advise and make recommendations about the provisioning, delivery and management of services provided by the UW Information Technology (UW-IT).

The IT Services Management Board is advisory to the Vice President for UW-IT and CIO and is responsible for ensuring alignment of UW-IT services with institutional IT strategy and priorities, and for optimizing the design, delivery, operation and sourcing of those services. The Board reviews major UW-IT services and makes recommendations for service life-cycle improvements, including changes and enhancements to current strategy, service, and applications that will improve the value of the services provided UW community. The Board also makes recommendations for information technology service Management process improvements efforts.

- **ensure alignment of UW-IT services with institutional IT strategy and priorities**

- **optimize the design, delivery, operation and sourcing of services**

- **review major UW-IT services and make recommendations for service life-cycle improvements**

- **make recommendations for ITSM process improvements**

Agenda

- Welcome/Purpose
- Agenda Review/Introductions

- ITIL Concepts
- Break
- ITIL at UW-IT & the Service Life Cycle
- Break
- ITIL and Strategy

- Looking Forward/Governance
- Closing

Shifts in Thinking

- **Services versus Technology Focus**
  - *From:* Technology components
  - *To:* End-to-end service delivery in order to support specific customer outcomes

- **Customer Value Focus/Strategy Alignment**
  - Deeper customer/business knowledge needed
  - Rich collaboration between customer and IT
  - Tighter integration between University and (IT) strategy

- **Teaming/Collaboration**
  - New ways needed to support services
  - Including end-to-end teams
  - New definitions of what "teaming together" means

ITIL - A Simple Explanation

Group Talk

- ## Services versus Technology Focus
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  - *To:* End-to-end service delivery in order to support specific customer outcomes
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Service Management and UW-IT

- Leveraging UW-IT Service Management

- An overview of our journey to implement Service Management within UW-IT
  - History
  - UW-IT Strategy
  - IT Service Catalog
  - Financial Management

UW-IT Service Management Journey

2006-2007
- ITIL Certs (2)
- NDT Change Mgmt.
- NDT Org Assessment
- NDT Re-org

2008-2009
- ITIL Certs(4)
- NDT Tech. & Ops. Mgmt.
- **Service Catalog**
- Service Mgmt. Team
- ITIL Overview to UW-IT Executive Team

2010-2011
- ITIL Certs 100+
- Service Catalog 2.0
- **Service Mgmt. Oversight Group (SMOG)**
- Smog Initiatives:
  - ITSM Strategy Approved
  - SMOG Initiates:
- **Service Owner s and Managers Named**
- **Improved Financial LOB/Services Alignment**
  - ITSM Mgmt. Portal
  - Org Level Incident Mgmt. Impl.
- ITSM Knowledge Building

2012
- ITIL Certs 250+
- ITSM Tool Search Begin
- SMOG Initiates:
  - Annual Service Assessments
  - Org Level Request Fulfillment Implementation.
  - SACM Discovery Phase
  - ITSM Portal Ph.2
- ITSM Governance
- **Expand ITIL Training to Campus**
- **Governance Boards created**

2013
- Governance Boards Operational
- ITSM Tool Set selected
- **ITSM Tool Set implementation begins**
- Change Management Implementation begins
-
-
-

Alignment with UW-IT Strategy

IT Service Management supports UW-IT Foundation and Strategic Goals, including Operational, Financial, and Staff Excellence.

UW-IT Strategy Map 2013

UW's mission:
Learning, Discovery, Service

UW's 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: Mobile, Global, Green, Cloud, Consumer, Safe, Simple, Open

Organizational Vision

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

Values: Trustworthy, 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 business and decision support systems

Organizational Goals

An exemplary organization

Strong strategic partnerships

A culture of exploration and sharing

ITIL V3 SERVICE LIFECYCLE

Service Strategy — Ensuring services meet business needs
Service Design — Designing the services
Service Transition — Moving services into production
Service Operation — Ongoing management of services
Continual Service Improvement — Ongoing improvement of services

PROCESSES

Service Strategy: Strategy Generation, Financial Management, Service Portfolio Management, Demand Management

Service Design: Service Catalog Management, Service Level Management, Capacity Management, Availability Management, IT Service Continuity Management, Information Security Management, Supplier Management

Service Transition: Transition Planning & Support, Change Management, Service Asset & Configuration Management, Release & Deployment Management, Service Validation & Testing, Evaluation, Knowledge Management

Service Operation: Event Management, Incident Management, Request Fulfillment, Problem Management, Access Management

Continual Service Improvement: 7 Step Improvement Process, Service Reporting, Service Measurement

FUNCTIONS: Service Desk Function, Technical Management Function, IT Operations Management Function, Application Management Function

LEGEND:
- V3 — Process - New to ITIL V3
- V2 — Process - From ITIL V2
- V3 — ITIL V3 Function

Organization level process in place – Mature through improved integration

PULTORAK & ASSOCIATES
the business of IT™
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ITIL® V3 SERVICE LIFECYCLE

Our Service Catalog

Views

- Basic Services
- Self-Sustaining Services

Categories
- Services A-Z
- Students
- Faculty
- Staff
- Administration
- Technologists
- Most Viewed
- About the Service Catalog

- Log in

Top Services for Students

Home ›

Service	Description
Access Technology Center (ATC)	Computer hardware and software for people with disabilities
Anti-Virus Software	Sophos Endpoint anti-virus sofware under UW central license
Catalyst Web Tools	Communication and collaboration applications for teaching, learning, and research
Collaboration Studios	Facilitate interactive, in-person project work in a shared workspace
Computer & Printer Troubleshooting, Repair & Moves	Troubleshooting, repair and moves of desktop computer hardware, software, and associate peripherals
Computing Workshops and Online Curriculum	Free computing workshops, Catalyst Web Tools, and Microsoft IT Academy online courses
Digital Audio Workstation	A digital audio recording and editing space with production hardware and software
Digital Presentation Studio	A private space for practicing presentations and to record sessions for later review
Email Forwarding and Filtering	Set up delivery options for your UW Email
Email Lists	With controlled access, automatically distribute and archive email to subscribers
Linux Shell Environment	Accounts on clustered Linux servers with a standard suite of applications
Long Distance Services	Long distance service
MyUW	Your personal portal to UW Web services
Odegaard Learning Commons	A large, 24-hour computer lab for the UW
Tegrity Lecture Capture	A cloud-based, campus-wide, lecture capture and presentation recording.
UW Directories	Query service of contact information about faculty, staff, and students; directory assistance information line
UW Google Apps	A UW-branded cloud service provided by Google that includes email, calendaring, and other collaboration tools
UW NetID	Personal, shared (course or departmental), sponsored, and temporary identification required for access to UW online resources
UW Windows Live	A UW-branded cloud service which provides access to many of Microsoft's online tools through a Microsoft Account.
UWare	Service to negotiate, administer, and distribute specific licensed software to the UW community
Web Publishing (for Faculty, Staff, Students, Departments, Courses)	A suite of Web servers for the UW community

Finances linked to Services

- Improved accounting and alignment of services and finances

- Built upon work done by WTC to cost our services

- Developed financial reports by service (LOB/Service)

- Enabled Service Owners to understand and begin to manage costs

Break – 10 Minute

New Seating Arrangement Upon Return

Betsy
Gary
Kate
Roland
Scott

B
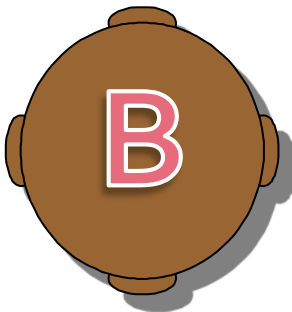
Brad
Jean
Mark
Tammy
Tom

C
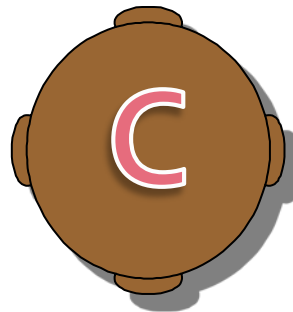
Barb
Bill
Erik
John
Linda

A
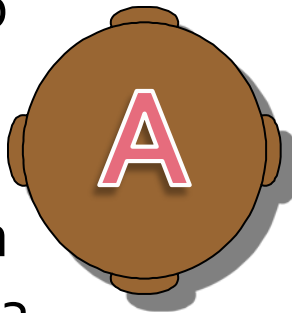
The Service Life Cycle Video

Table Talk

Discuss at your tables:

How could using the Service Lifecycle change the way we do business at the University of Washington? And why?

New Roles in UW-IT

New ways to collaborate means using new perspectives in how we do work. These roles support new ways of evaluating and working.

- **Service Management Oversight Group (SMOG)**

- **Service Owners**

- **Service Managers**

- **Process Owners**

Service Mgmt. Oversight Group (SMOG)

SMOG scope – an evolutionary process with the SMB

- Established to ensure that UW-IT Service Management & Planning efforts align with the larger UW-IT strategy

- Oversees the UW-IT service catalog and service portfolio

- Sets service management priorities

- Reviews and approves IT Service Management (ITSM) initiatives, tools and templates

- Reviews Annual Service Assessments (ASAs)

Service Owner

- Responsible for one or more services in the UW-IT Service Catalog

- Ensures that these services receive strategic attention and appropriate resources, and that the services we offer support the mission and business needs of the University

- Authority to make decisions based on customer needs, good engineering practices, strategic alignment, and financial requirements

- Service contact for SMB

Service Manager

- Understands the customer needs and represents those needs to UW-IT engineering

- Manages the end-to-end lifecycle of one or more services across multiple UW-IT divisions and units

- Ensures that services are managed reliably, efficiently, and strategically

- Ensures that services continues to support the mission and business needs of the University

- Service Managers have the authority to make tactical decisions and strategic recommendations

SO/SM Listing resides on Portal

Service Catalog Service Name	Line of Business (LOB) Description	Service Owner	Service Manager	ASA
ACCESSIBILITY	ACCESSIBILITY			
Access Technology Center (ATC)	Access Technology Lab (ATL)	Sheryl Burgstahler	Dan Comden	
AccessComputing	DO-IT	Sheryl Burgstahler	Jodi McKeeman	
AccessSTEM	DO-IT	Sheryl Burgstahler	Jodi McKeeman	
Braille & Alternative Text Production	DO-IT	Sheryl Burgstahler	Dan Comden	
DO-IT	DO-IT	Sheryl Burgstahler	Jodi McKeeman	
BUSINESS INFO SYSTEMS	BUSINESS INFO SYSTEMS			
Admin Apps for Advancement	Alumni and Advancement	Bill Shirey	Brent Holterman	
Admin apps for Facilities	Facilities Services*	Bill Shirey	Brent Holterman	
Admin Apps for Finance	Finance Program	Jeanne-Marie Isola	Jan Sullivan; Marcy Tufarolo/ ASA Dev	ASA FASTRANS OASIS ASA BGT ASA eTravel ASA
Admin Apps for HR/Payroll	HR/Payroll Program	Lisa Yeager	Alin Hunter	ASA
Admin Apps for Student Admin	Student Program	Darcy Van Patten	Hugh Parker	
Decision Support Services	Enterprise Information and Integration Services	Bill Yock	Anja Canfield-Budde	
	*also includes LOB: Chemical Tracking System			

Process Owner

- Ensure the process is fit for purpose.

- Responsible for
  - Ongoing business value and integrity of the process design across the service, functional, and organizational boundaries the process crosses

  - Planning and implementing practices, orientation and training to ensure organizational understanding and adoption of the process activities

  - Protecting, measuring and reporting on process compliance across organizational silos

Standard Managed Servers Annual Service As...

template version 1.0

1.0 Service Summary

1.1 Name	Standard Managed Servers
1.2 Document Date	10/3/2011
1.3 Service Owner	Brad Greer
1.4 Service Manager	Rebecca Galloway
1.5 Service Catalog Link	http://depts.washington.edu/uwtsc...
1.6 Internal Documentation Link *(optional)*	https://wiki.cac.washington.edu/...
1.7 Mission/Vision	To provide general computi... common designs, this se... The service has 2 primar... • Expert system d... • Actual server d... Multiple datace... estimate the costs for ca...

1.8 Statistics: quantity	Units delivered are "server" or "virtual server slice". Current stats (10/1/2011) for the service are retrievab... • SMS billed - 28 servers • SMS not billed - 5 servers • MOU - 58 servers
1.9 Statistics: lifecycle	service has been provided using MOUs for severa...
1.10 Statistics: customers	no statistics kept for this
1.11 Time Reporting/ Labor Expenses	Cactrack time for direct time reporting go... no longer required. A portion of standard ... FY11 data

FY11 Cactrack Hours - Managed S...

3.0 Annual Plan for the Next Year (in progress)

3.1 Key Initiatives	• increase # of servers in this servic... • verify hours spent (billed) match ... • improve choices for Business ...
3.2 Pressing Needs	server backup costs are too high c...
3.3 Key Risks	• Combination of hourly rat... assigned (overhead, oth... • One hourly rate means... • Technology changes ... • UW-IT systems and ... LOB/budget reports ...
3.4 Key Performance and Success Indicators	customer satisfaction ... number of servers in t... LOB reporting (annu...
3.5 Key Service Dependencies	• enterprise ... • enterprise ... • data cen... • networ... • comp... • campus...
3.6 Process Development	no ITIL process improvements planned ... Mangement.

4.0 Three Year Business Assessment

4.1 Context	Technology and marketplace changes will likely imp... the next few years. Either fill in the fields below, or w...
4.2 Key Service Opportunities	• Offering mainstream and UW-specific technologies a... images, 2 factor auth, etc) • Offering standard Business Continuity solutions • Offering standard "uw security" compliant solutions • Offering cloud hosted servers that are well-integrated w... • providing dashboard of important server operation infor...
4.3 Primary Customer Complaints	lead time to setup a new server (?) cost of standard managed server vs having student or grad ... cost of backups for standard manage servers cost of database management for standard managed serv...
4.4 Customer Projections	expect steady slow growth. also expect non-billed servers to ...
4.5 Changes in Usage	Colo service offering smaller provisioning units could reduce us... Cost studies on campus may help this "fully costed" service see...
4.6 Alternative Approaches	more virtualization could help us make better use of hardware, st...
4.7 Value of UW-IT providing service	• on-premises: we can meet directly with customers and be very re... • uw-it can provide centralized guidance to help the UW dept stand... • we know the uw technology infrastructure and can integrate it bett... • its low cost to provide since we already run and manage a signific... • providing this service helps uw fund uw-it to improve our staff's skil...

Service Strategy Goal

- Transform Service Management into Strategic Asset which:

  - Leverages IT to realize UW's strategy

  - Leverages the help desk to increase student/faculty/staff satisfaction

  - Provides services to meet the true needs of student/faculty/staff

  - Leverages technology to increase the value the UW gives back to the state

Service Strategy Objectives

- What services should we offer and to Whom?

- How do we differentiate ourselves from competing alternatives?

- How do we truly create value for our customers?

- How do we capture value for our stakeholders?

- How can we make a case for strategic investments?

Break– 10 Minute

New Seating Arrangement Upon Return

Erik
Gary
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Mark
Tom

B

C

Betsy
Barb
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Roland

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Jean
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Scott
Tammy

A
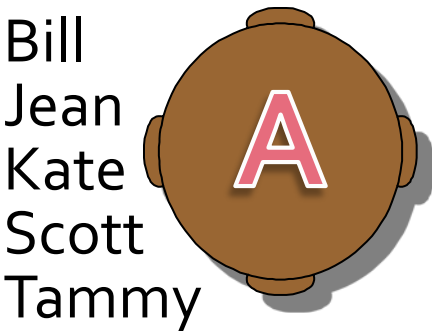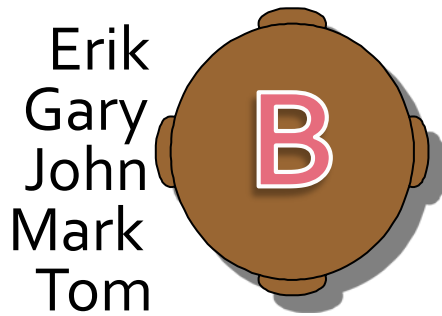
Service Strategy Goals and Objectives

Table Talk

Mark each area 1 to 5 with 5 being best. Connect your dots forming a shape. Compare and discuss with your table mates.

ITIL Foundations Post training conversations

Discussion Summary
June 27 and August 22

# Discussion Outcome

- **Sharing efforts between the Units**
  - **Campus-wide Knowledge Management**
  - **Continual Service Improvements**
  - **Integrated Service Desk concept**
  - **Integrated Catalog of services**

- **Enterprise Wide**
  - **Governance across local and central IT groups**
  - **University IT Strategy**
  - **Service Level Agreements**

Governance Going Forward

Evolution of Governance

IT GOVERNANCE

President Provost

University Budget Process

IT Strategy Board

VP for UW-IT and CIO

Strategic Initiatives

Chancellors

Deans

VPs

IT Service Investment Board

TRF Advisory

Service Investments

Unit Administrators

Unit IT Directors

UW-IT Directors

IT Service Management Board

Service Catalog
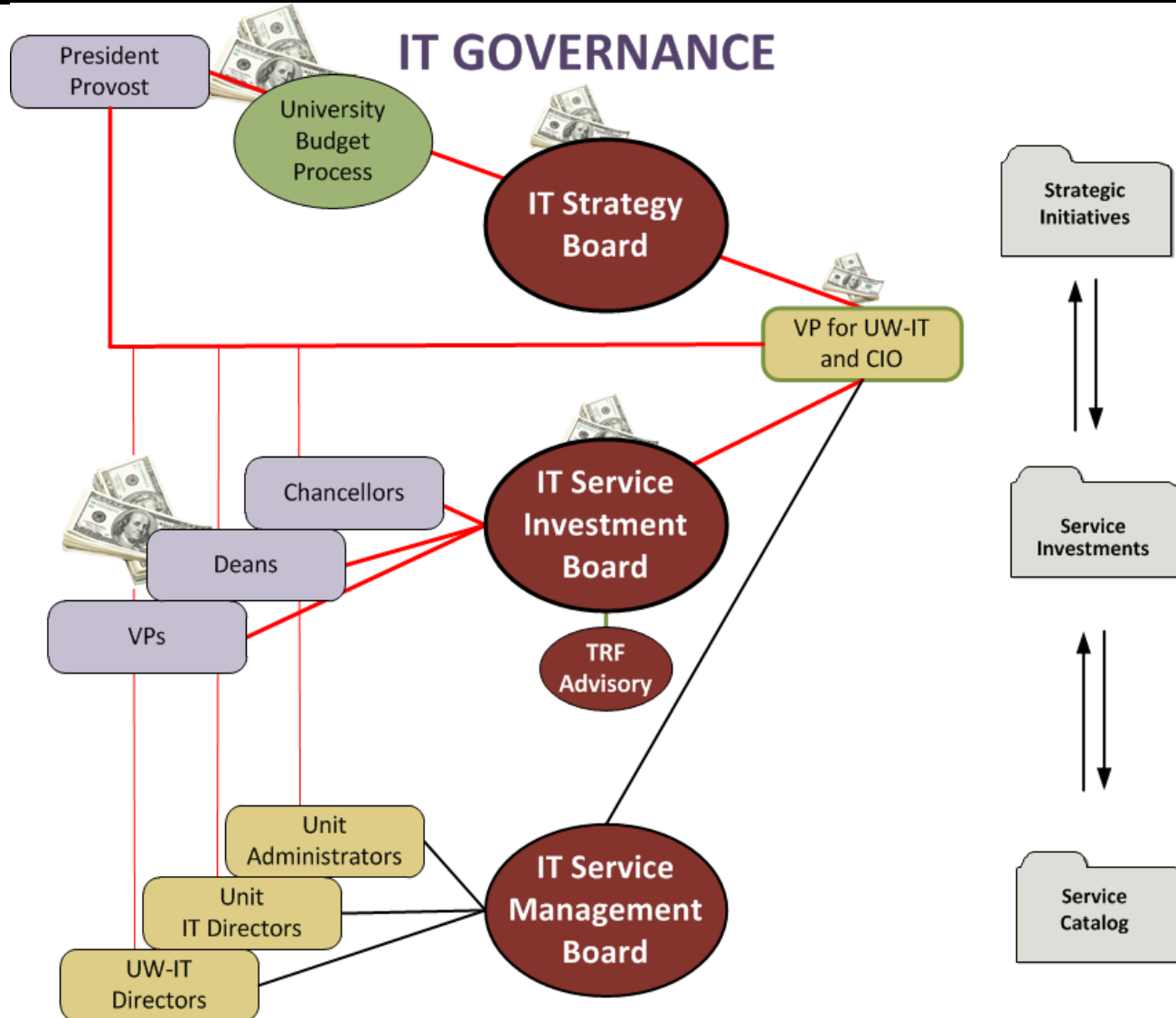
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Perspectives of Governance

SMB Level

IT GOVERNANCE

President / Provost
University Budget Process
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08.08.12

Strategic Initiatives
Service Investments
Service Catalog
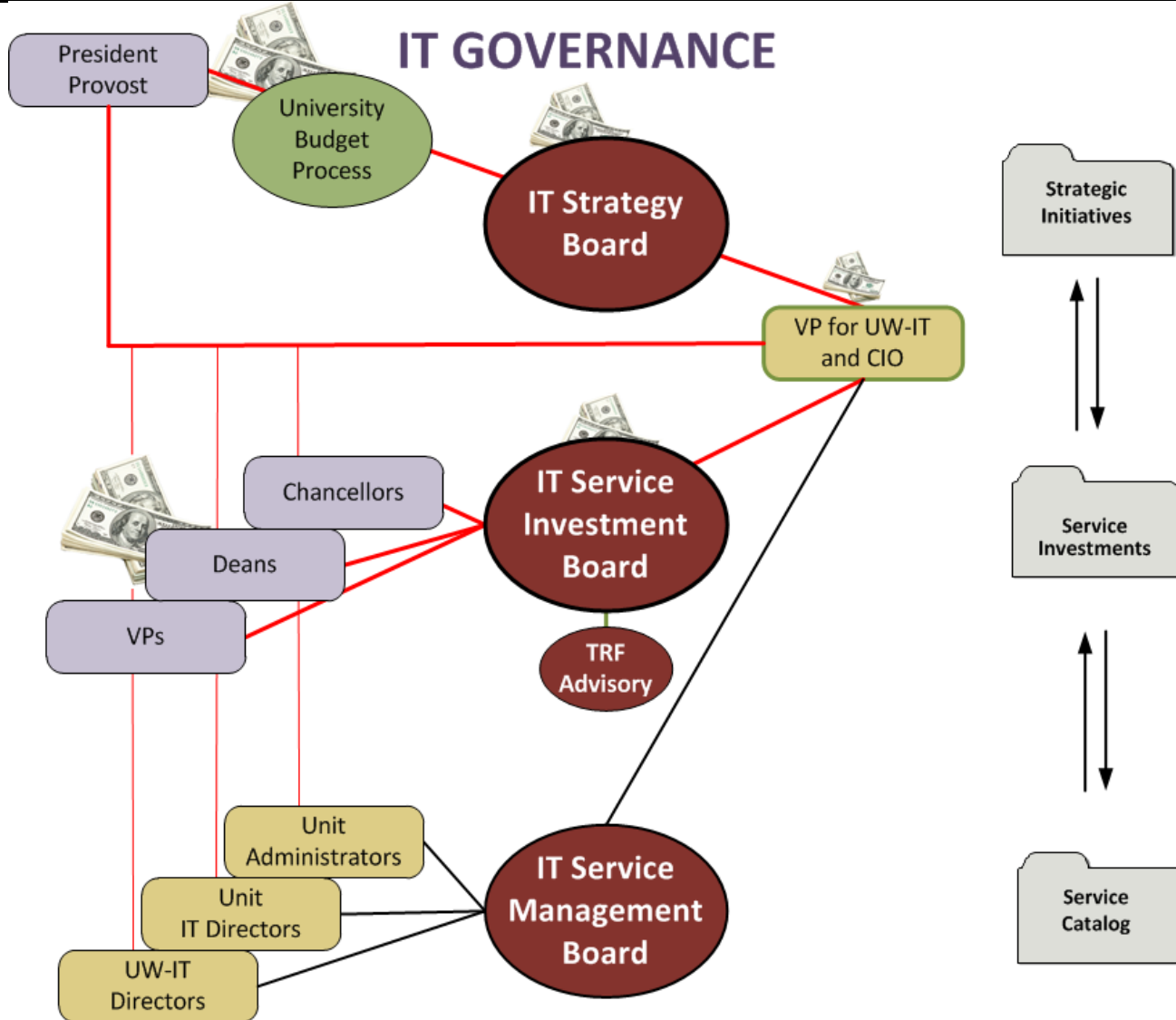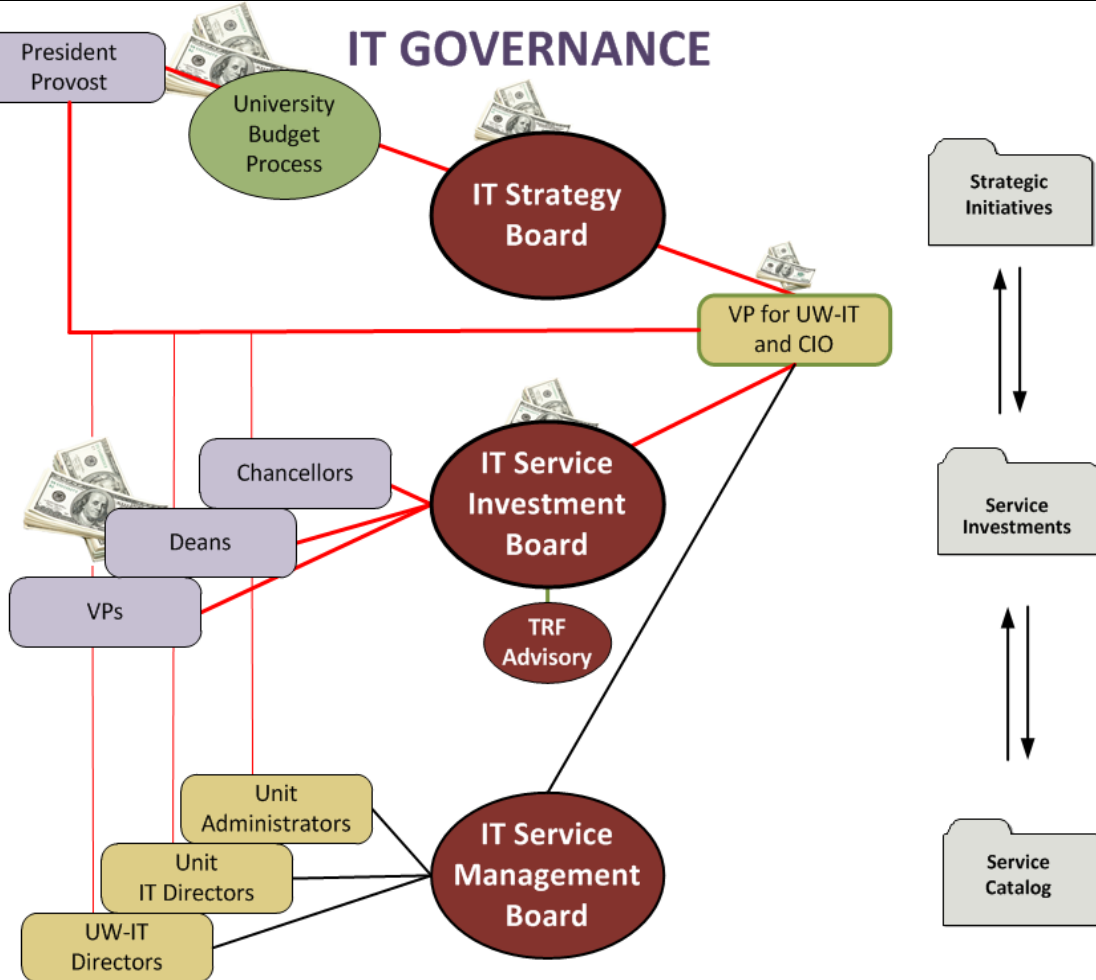
How
are IT Services Optimized...

- Buy vrs. Build
- Who delivers what
- Lifecycle improvements

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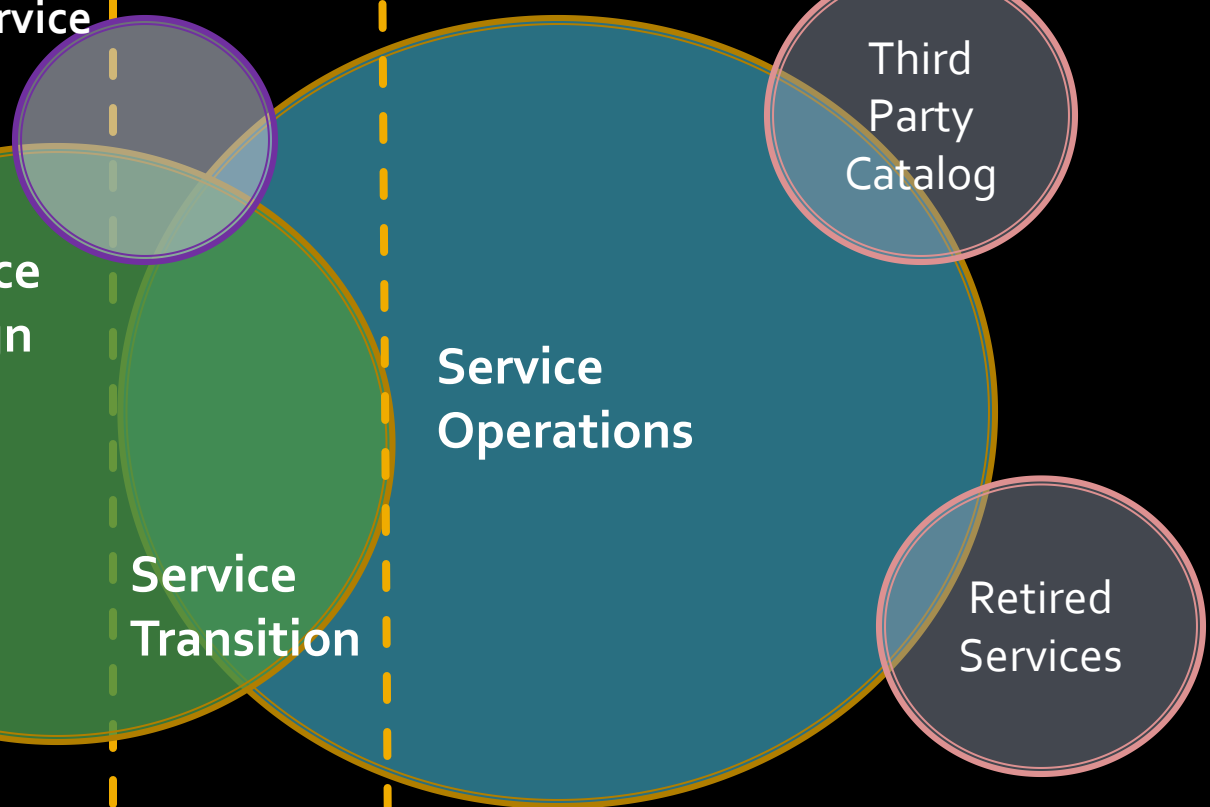
- **ensure alignment of UW-IT services with institutional IT strategy and priorities**

- **optimize the design, delivery, operation and sourcing of services**

- **review major UW-IT services and make recommendations for service life-cycle improvements**

- **make recommendations for ITSM process improvements**

Next Steps

Collaboration through Governance

IT GOVERNANCE

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University Budget Process

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Unit IT Directors

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IT Service Management Board

Strategic Initiatives (Examples)
1. Cloud
2. ERP
3. Student Experience
4. IT Costing
5. Research Computing (eScience)

Service Investments (Examples)
1. eProcurement
2. EDMS
3. LMS
4. HPC (Hyak)
5. Commodity Services
6. Collaboration Tools
7. Science Data Management

Service Catalog (Examples)
1. Network
2. Telecom
3. email
4. Storage
5. Managed Servers
6. Managed Devices

08.08.12

IT Costing Study

- Identify campus unit IT services and costs and possible cost improvements through

    - Collaboration among units.
    - Leveraging services provided outside the unit – by a college, UW-IT, or a cloud provider.

- Studied 47 units with total of 352 IT FTE and $44.6 million in annual IT costs

- These 47 units support about 45% of the total University faculty and staff.

Enterprise-Level Recommendations

- **Create New Governance Structure** *– in order to implement the other recommendations*

- **Consolidate Servers and Storage** *– centrally or to the cloud*

- **Learning Management Tool** *– high priority due to impact to the students*

- **Strategy for End-User Devices** *– initial focus on admin users and student labs*

- **Email and Calendaring System**

- **Reduce Shadow System Support**

Unit-Level Recommendations

- **Consolidate Commodity Services** *– leverage UW-IT and collaborate with other units*

- **Structure End-User Support** *– implement structured processes and standards*

- **Use eProcurement Agreements** *– for purchase of end-user systems*

- **Share Personnel Resources** *– for specialized services (db admin, managing collaboration environments, reporting, etc.)*

- **Review Supported Applications**

Leveraging the ITIL foundations training.

Closing