

# <Service Name> Annual Service Assessment

## 1.0 Service Summary

<b>1.1 Name</b>	<i>The official service name as listed in the Service Catalog</i>
<b>1.2 Document Date</b>	<i>Date document created, or latest version date.</i>
<b>1.3 Service Owner</b>	<i>Include name with title and organization.</i>
<b>1.4 Service Manager</b>	<i>Include name with title and organization.</i>
<b>1.5 Service Catalog Link</b>	<i>Provide the Service Catalog URL for the service.</i>
<b>1.6 Internal Documentation Link (optional)</b>	<i>If applicable, provide a link to internal UW-IT service documentation.</i>
<b>1.7 Mission/Vision</b>	<i>In a narrative, describe in one or two paragraphs the mission and vision for this service. Include its place in the UW-IT Service Portfolio, or align the service with a goal(s) in the UW-IT Strategy.</i>
<b>1.8 Statistics: quantity</b>	<i>Include the quantity and type of units the service provides</i>
<b>1.9 Statistics: lifecycle</b>	<i>Include the age of the service, i.e., for how long has UW-IT provided this service.</i>
<b>1.10 Statistics: customers</b>	<i>Include data regarding the consumers of this service. This could include the type of customers (e.g., researchers, students, administrators) and applicable percentages.</i>
<b>1.11 Time Reporting/ Labor Expenses</b>	<i>What is the budgeted Labor amount for the current fiscal year? What is the current budget variance? Based on current trends and plans, what do you expect the variance to be at the end of this fiscal year? Provide a brief description of the labor supporting this service, including BPSE and CacTrack project data. Reference this link for B&amp;F reports: <a href="https://www.washington.edu/intech/baf/reports/financial/">https://www.washington.edu/intech/baf/reports/financial/</a></i>
<b>1.12 Hardware/ Software Expenses</b>	<i>What is the Budgeted Non-Labor amount for the current fiscal year? What is the current budget variance? Based on current trends and plans, what do you expect the variance to be at the end of this fiscal year? Provide a brief description of the expenses; include BPSE and vendor details. Reference this link for B&amp;F reports: <a href="https://www.washington.edu/intech/baf/reports/financial/">https://www.washington.edu/intech/baf/reports/financial/</a></i>
<b>1.13 Financial Health Assessment</b>	<i>Provide a general description of the financial condition of the service. This could include context for related services, a comparison to the previous year's financial health, or other summary financial information relevant to the service.</i>
<b>1.14 Financial Coding</b>	<i>List the applicable LOBs and BPSEs for this service.</i>
<b>1.15 Funding Source</b>	<i>Indicate if this service is Self-sustaining, covered by the Technology Recharge Fee, or University Supported.</i>
<b>1.16 Budget</b>	<i>Include the related budget number(s), and the annual allocated amount.</i>
<b>1.17 Financial Trends</b>	<i>Include trend data regarding revenue, rate, expenses.</i>
<b>1.18 Customer Satisfaction</b>	<i>Include any customer satisfaction data gathered from surveys, customer meetings/ feedback/ complaints. Provide a grade for the service (A-F).</i>

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## 2.0 Summary of Previous Year

<b>2.1 Last Year's Goals</b>	<i>If an Annual Service Assessment was completed in the previous year, include the listed goals. .</i>
<b>2.2 Summary of Major Accomplishments</b>	<i>This section could include improved functionality, increased customer adoption/usage, improved disaster recovery infrastructure, improved reliability, etc.</i>
<b>2.3 Program Management Office Data</b>	<i>Include any projects from last year and relevant information. Provide URL(s) for these project pages.</i>
<b>2.4 Rate Data</b>	<i>Include any rate recalculation, budgeting, and cost data</i>

## 3.0 Annual Plan for the Next Year

<b>3.1 Key Initiatives</b>	<i>List key initiatives/projects planned for the next 12 months. Include phase, milestones, or deliverables as appropriate by academic quarter. Include cost and expected lifetime of investment.</i>
<b>3.2 Pressing Needs</b>	<i>Include the drivers for the tasks above, and other needs that are not currently being addressed.</i>
<b>3.3 Key Risks</b>	<i>Note as Low, Medium, High and describe the nature of the risk(s). Include charts, graphs or other data as appropriate.</i>
<b>3.4 Key Performance and Success Indicators</b>	<i>Include methods used to measure performance and progress.</i>
<b>3.5 Key Service Dependencies</b>	<i>Include any dependency information not captured in other categories above. This might include funding sources, completion of related projects or upgrades, etc.</i>
<b>3.6 Process Development</b>	<i>Document which 2-3 ITIL processes will be developed and documented (e.g., Incident Management, Request Fulfillment, Change Management, etc.)</i>
<b>3.7 Assistance Requested</b>	<i>Include any assistance you might request from the Service Management Oversight Group (SMOG), if any.</i>

## 4.0 Three Year Business Assessment

<b>Context</b>	<b>Technology and marketplace changes will likely impact this service line/ family. In this section, consider the factors listed below in projecting issues for the next few years. Either fill in the fields below, or write a paragraph or two including the factors listed below.</b>
<b>4.1 Key Service Opportunities</b>	<i>Indicate possible service opportunities related to the marketplace or other technology/ partnership evolutions.</i>

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<b>4.2 Primary Customer Complaints</b>	<i>Include issues and attempt to quantify them.</i>
<b>4.3 Customer Projections</b>	<i>What customer needs, growths/decline projections can be made?</i>
<b>4.4 Changes in Usage</b>	<i>What would increase/ decrease customer usage.</i>
<b>4.5 Alternative Approaches</b>	<i>What alternative approaches might meet changes in need or usage?</i>
<b>4.6 Value of UW-IT providing service</b>	<i>What is the unique value add of UW-IT providing this service versus another service provider (if any)?</i>
<b>4.7 Missed Opportunities</b>	<i>Are any strategic opportunities being missed?</i>
<b>4.8 Funding Stability</b>	<i>List any issues related to funding and possible alternatives.</i>
<b>4.9 Lifecycle Considerations</b>	<i>What consequences or impacts would there be with no longer providing this service? Would you enter into this service if making the decision today?</i>
<b>4.10 Resources</b>	<i>List the most critical or scarce resources to sustain service.</i>
<b>4.11 Cost Assessment</b>	<i>May include the following: list of significant costs, percent of front-room versus back room costs, percent of development versus sustaining costs, how additional funding might be utilized, how a funding cut would be mitigated, etc.</i>
<b>4.12 Performance Benchmarks</b>	<i>Include significant benchmarks related to performance, usage, costs, similar services, etc.</i>

### **5.0 Reviews and Approvals**

<b>5.1 Review History</b>	<i>List Annual Service Assessment reviewers and approvers.</i>
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