IT Service Management Board

November 18, 2013

Agenda

- UW IT Strategic Plan (draft)

- Technology Recharge Fee Update

- FY 2015 Investment Opportunities

- Project Portfolio Prioritization Update

- Sunset Services Recommendation

- Server Consolidation

- Wrap Up

UW-IT Strategic Plan (draft)

UW-IT Strategic Overview

Vision
➢ Convenient and safe access to information and services across time, place, device and organizational boundaries

Mission
➢ Enable students, faculty and staff to be more effective
➢ Help UW manage risks and resources
➢ Encourage innovation and competitiveness

Foundation
➢ Be a trusted, sought-after partner, passionate about using IT to improve the UW
➢ Operate an exemplary organization, known for excellence, efficiency, and integrity
➢ Develop strong strategic partnerships
➢ Foster a culture of exploration, sharing, and data-driven results
➢ Listen, anticipate, communicate, execute

Drivers
➢ Cloud, Collaboration, Consumerization, Mobility, Personalization, Big Data

Strategic Goals

| Provide Superior Infrastructure & Tools | Support World Class Research | Enable Innovative Teaching | Modernize Information & Business Systems | Promote Security and Business Continuity | Deliver Effective Services With Cost Transparency |

Assessments & Outcomes

| Technology Business Management | Customer Satisfaction | Governance & Decision Making | Engagement |

Timeline for Administrative Application Assumptions

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Administrative Systems Replacement

| FY 13 | FY 14 | FY 15 | FY 16 | FY 17 | FY 18 | FY 19 | FY 20 |

HR/Payroll
- Business process redesign
- Replace legacy systems
- Additional functionality

Finance
- Procure to Pay
- HR/P - finance intersections
- Options analysis
- Business process redesign
- Replace legacy systems
- Additional functionality

Student
- MyPlan / Student self svc
- Curriculum Management
- Scoping & tech feasibility
- Business process redesign
- Student - finance intersections
- Replace legacy systems

Enterprise Info Mgmt
- EDMS proof of concept
- Enterprise integration
- EDW / BI build-out

Nov 2013

── Significant implementation effort
- - - Incremental modernization

(Ongoing maintenance and production support not represented)

➢ One major system at a time

➢ Incremental innovation are a priority, especially in student facing systems

➢ Investments in business process redesign will lead to better outcomes

➢ Momentum and expertise from system replacements should be leveraged

➢ Better information now for decision making is critical
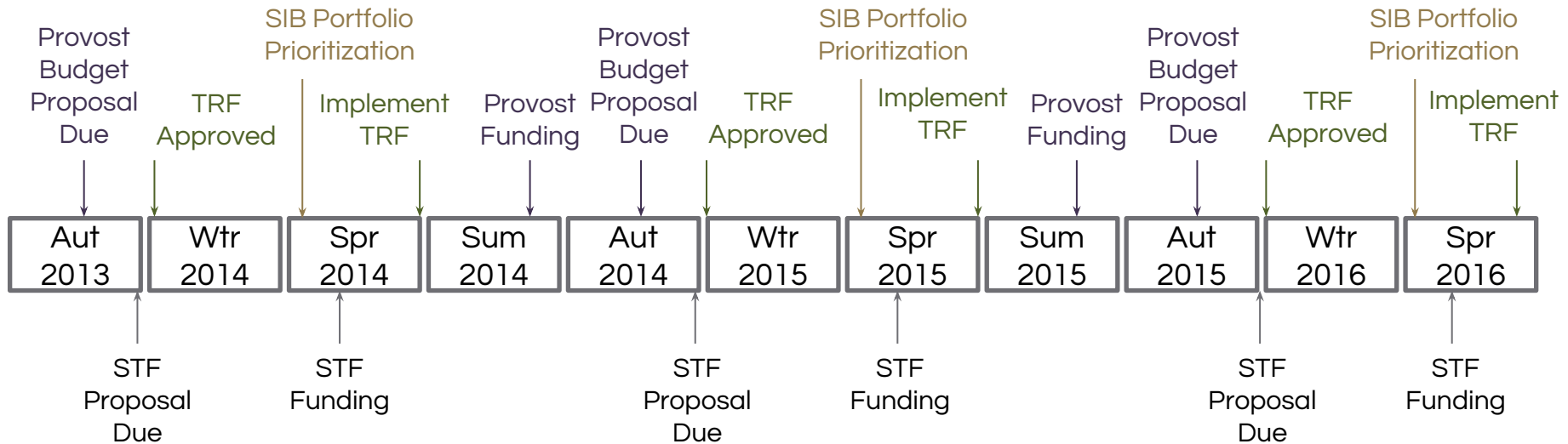
Administrative Systems Replacement
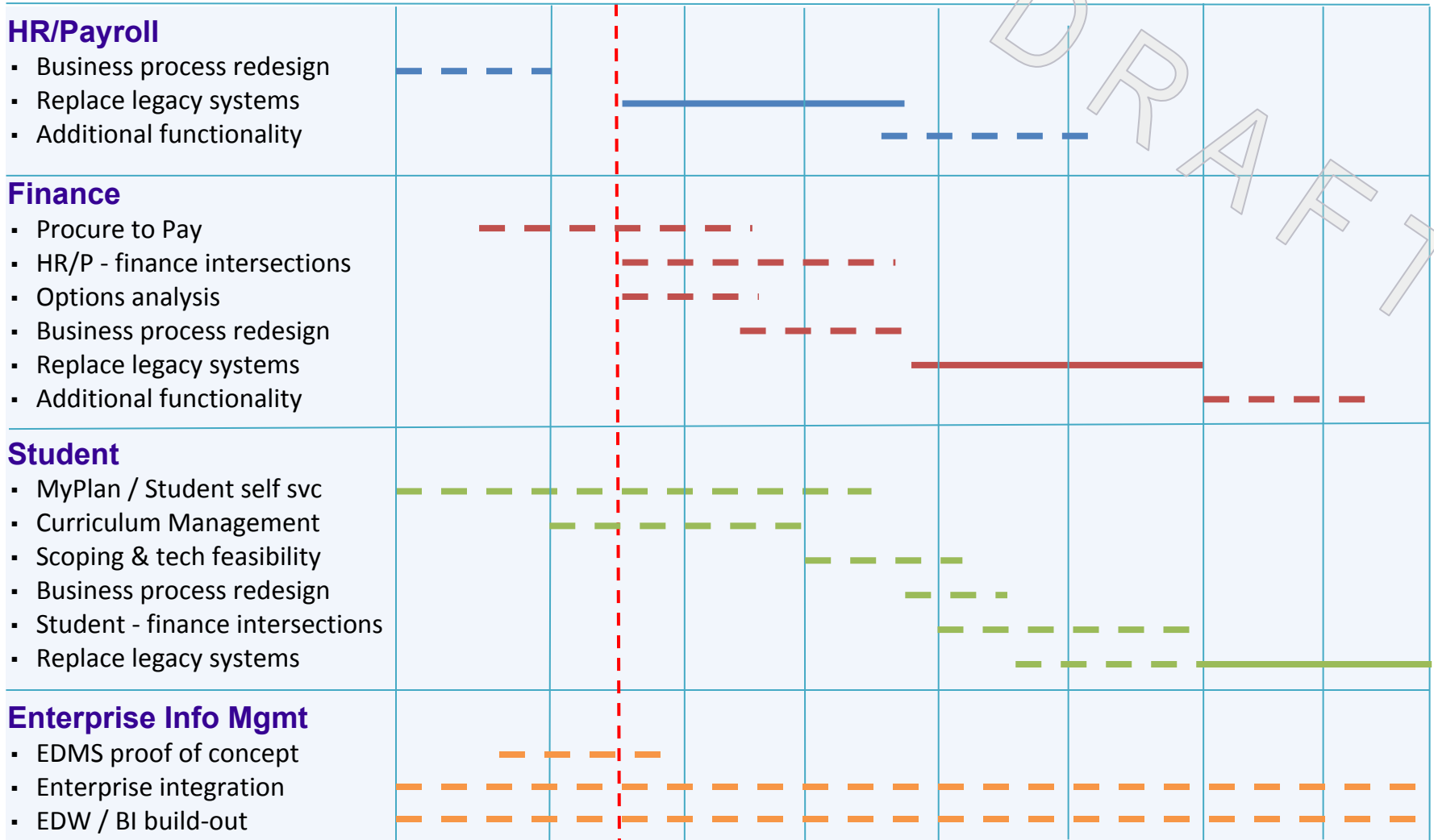
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IT Service Investment Board Timeline

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Aut 2013	Wtr 2014	Spr 2014	Sum 2014	Aut 2014	Wtr 2015	Spr 2015	Sum 2015	Aut 2015	Wtr 2016	Spr 2016

Above the timeline (labels pointing down):
- Provost Budget Proposal Due → Aut 2013
- TRF Approved → Wtr 2014
- SIB Portfolio Prioritization → Spr 2014
- Implement TRF → Spr 2014
- Provost Funding → Sum 2014
- Provost Budget Proposal Due → Aut 2014
- TRF Approved → Wtr 2015
- SIB Portfolio Prioritization → Spr 2015
- Implement TRF → Spr 2015
- Provost Funding → Sum 2015
- Provost Budget Proposal Due → Aut 2015
- TRF Approved → Wtr 2016
- SIB Portfolio Prioritization → Spr 2016
- Implement TRF → Spr 2016

Below the timeline (labels pointing up):
- STF Proposal Due → Wtr 2014
- STF Funding → Spr 2014
- STF Proposal Due → Aut 2014
- STF Funding → Spr 2015
- STF Proposal Due → Aut 2015
- STF Funding → Spr 2016

- ☐ Portfolio Review Board (bi-weekly) – Managed resources, assure projects are on track
- ☐ IT Service Management Board (monthly) – Make recommendations for service improvements and discontinuation of service
- ☐ IT Service Investment Board (SIB) (monthly) – Project priorities, budget requests, TRF
- ☐ IT Strategy Board (3 times per year)– Policy, strategy, major IT investment, review

Technology Recharge Fee Update

TRF Review: Progress to Date

- Successful audit of the TRF rate process by UW Internal Audit in Spring 2013

- Annual review and analysis by the Technology Recharge Fee Advisory Committee in October

- Recommendation to the Service Investment Board today

Technology Recharge Fee Advisory Committee

Bill Ferris UW Information Technology **Co-Chair** **Tom Sparks** College of Engineering **Co-Chair**
Cristi Chapman Management Accounting & Analysis
David Green School of Medicine
Amy Floit Office of Planning & Budgeting
Jonathan Franklin School of Law
Paul Ishizuka UW Medicine
Linda Rose Nelson College of Arts & Sciences
Paul Henderson, Ex-officio UW Medicine IT Services

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TRF Rate for FY 2015
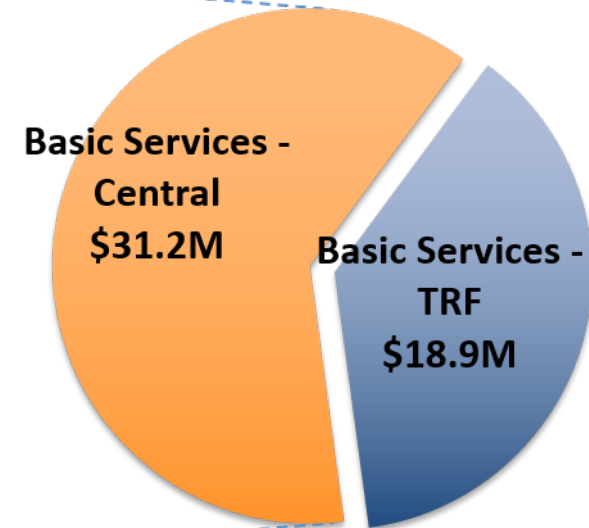# Cost Model Assumptions

- Maintain methodology approved by Service Investment Board for FY14 & FY15

- Use UW-IT FY 2014 budget as base

- Maintain FY 2014 TRF funding level
  - Use UW-IT Fund Balance to cover increase in expenditures - $2.9M

- New investments from Provost are not included in calculations

UW-IT FY14 Budget

$109M
Total UW-IT Budget

Self Sustaining
$25.2M

University Supported
$3.9M

Basic Services, $50.1M

Information Management
$22.1M

Student Tech Fee
$2.2M

Classroom, Technology, & Events, $6M

$50M
Basic Services

Basic Services - Central
$31.2M

Basic Services - TRF
$18.9M

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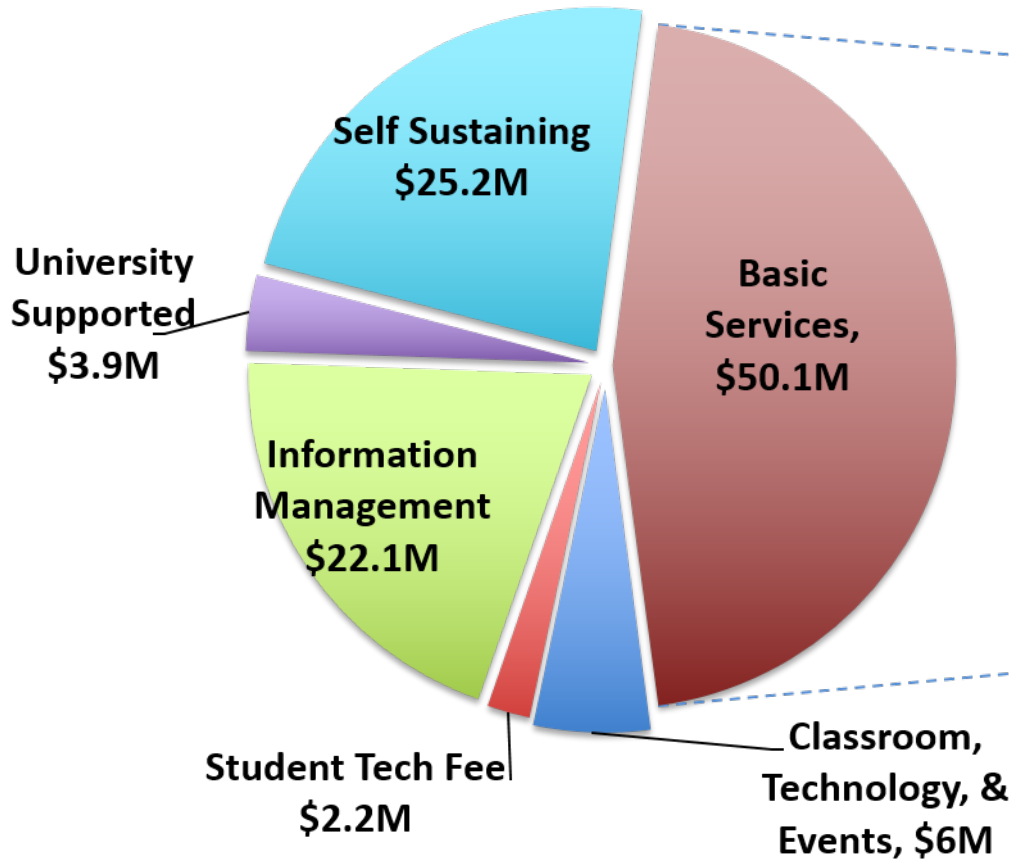
TRF Rate for FY 2015

- TRF Committee recommendation is to maintain current TRF Rates (no change)*:

	FY 14	FY 15
Campus Rate	$54.50 mo	$54.50 mo
Medical Center Rate	$50.00 mo	$50.00 mo

*TRF rate calculation resulted in an immaterial rate change. Committee recommended maintaining existing rates.

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Looking Ahead

- Explore major changes to TRF for FY16:
  - Move to more transparent and simpler allocation methodology
  - Align with current UW-IT organization and services
  - Review treatment of Information Management and Classroom Technology & Events (new to UW-IT)
  - Review treatment of students
  - Review allocation of GOF/DOF
- Begin in Winter/Spring 2014

FY 2015 Investment Opportunities

Should we include in the TRF?

- 40G Campus Network Upgrade
  - *Increase the campus backbone network capacity to support big data research*

- Undergraduate Admissions Modernization
  - *Transition the paper-intensive admissions review to an online process*

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Impact of New Investments on TRF

	FY 15	40 GB	UGA	Both
Campus	$54.50	$56.68	$56.98	$59.26
Med Ctrs*	$50.00	$50.00	$50.00	$50.00

Medical Centers are covered by separate networking agreement, and not impacted by 40 GB network. Medical Centers do not contribute to Information Management efforts.

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Information Item:
Included in UW-IT Provost Request FY 2015

- 40G Campus Network Upgrade
- Undergraduate Admissions Modernization
- MY Husky Experience
  - A technology ecosystem that promotes student engagement in co-curricular learning experiences across campus
- UW Academic Explorer
  - Following MyPlan, additional academic planning tools

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UW-IT Portfolio Ranking Process Follow Up

UW-IT Portfolio Ranking Process Outcomes

- Use ranking process priorities to guide UW-IT project resource allocations when conflicts arise

- Hold next phase of eFECS project*

  - Scope a more limited project to deliver functionality not provided by future replacement systems

- Hold next phase of MyFD project*

- Seek funding for top two SIB priorities: 40G Network and Undergraduate Modernization

  Projects have maintenance-level funding

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Sunset Services Recommendation

- Report status

- Future

UW-IT Service Cost

	RtB	CtB	Total
Service 1	$xx	$xx	$xx
Service 2	$xx	$xx	$xx
Service 3	$xx	$xx	$xx
....			

Server Consolidation

- Costing Study Recommendations

- Current UW-IT Plans

Server Consolidation*
Short Term

- Transition Active Directory services to UW-IT
  - We recommend that UW IT establish a team focused on assisting units with this transition.

- Migrate DNS and DHCP network services to UW-IT
  - We recommend that UW-IT establish a team focused on assisting units with this migration.

- Server & Storage Pilots
  - Conduct a server and storage consolidation and virtualization pilot with a small group of campus units and UW- IT.

 From UW Campus IT Costing Study, March, 2012

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Server Consolidation*
Long Term

- Servers & Storage
  - Develop an institutional strategy and direction for server and storage management reflecting both consolidation and virtualization.
  - Additionally, establish institutional policies addressing server requirements and server refresh requirements consistent with institutional green objectives.

From UW Campus IT Costing Study, March, 2012