AGENDA

> Call to order
  – Welcome and introductions
  – 11/30 Strategy Board recap

> IT Governance Evaluation Update
  – Action plan update
  – Critical IT issues prioritization

> Technology Recharge Fee FY 2020 Recommendation and Review

> Major Projects Update
  – Finance Transformation
  – Project sequencing and prioritization
  – UW Enterprise IT projects update

> Wrap up
  – Future agendas
    > UW-IT projects and investments
    > Microsoft Site Licensing
11/30 Strategy Board Recap
QUESTIONS
IT Governance Evaluation Update

Erik Lundberg
Assistant Vice President, Research Computing & Strategy,
UW-IT
## ACTION PLAN

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Complete</th>
<th>Underway</th>
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<tbody>
<tr>
<td>Continue support for IT Governance Boards</td>
<td>✔️</td>
<td></td>
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<tr>
<td>Keep current model</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Broaden representation</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Improve discussion and engagement</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Retain advisory relationship with Provost</td>
<td>✔️</td>
<td></td>
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</tbody>
</table>
INFORMATION TECHNOLOGY GOVERNANCE

IT Strategy Board
- Prioritize Projects;
- Recommend Funding Levels;
- TRF Review

IT Service Investment Board
- Refer Issues; Provide Input
- Direction on Changes to Services
- Refer Issues; Provide Input

IT Service Management Board

TRF Advisory
- Provide Analysis; Identify Issues; Recommendations
- Prioritize Projects; Recommend Funding Levels; TRF Review
- Service and Process Improvement Recommendations

President Provost

Vice President for UW-IT and CIO

Guidance on Strategic Direction

IT Boards supported by the Office of the VP for UW-IT and CIO
### IT Strategy Board

<table>
<thead>
<tr>
<th>Member</th>
<th>Position</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aaron Powell</td>
<td>Chair</td>
<td>UW Information Technology</td>
</tr>
<tr>
<td>Anind Dey</td>
<td>The Information School</td>
<td>Chair</td>
</tr>
<tr>
<td>Joy Grosser</td>
<td>UW Medicine</td>
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<tr>
<td>Sarah Lazowska</td>
<td>Computer Science &amp; Engineering</td>
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<tr>
<td>Mary Lidstrom</td>
<td>Office of Research</td>
<td></td>
</tr>
<tr>
<td>Brian McCartan</td>
<td>College of Engineering</td>
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<tr>
<td>Greg Miller</td>
<td>School of Medicine</td>
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<tr>
<td>Sean Mooney</td>
<td>Academic and Student Affairs</td>
<td></td>
</tr>
<tr>
<td>John Slattery</td>
<td>School of Medicine</td>
<td></td>
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<tr>
<td>Denzil Suite</td>
<td>Office of Student Life</td>
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<td>Wolf Yeigh</td>
<td>UW Bothell</td>
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### IT Service Investment Board

<table>
<thead>
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<th>Member</th>
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<tbody>
<tr>
<td>Pedro Arduino</td>
<td>College of Engineering</td>
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<tr>
<td>Maureen Broom</td>
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<td>Susan Camber</td>
<td>Financial Management</td>
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<td>Walte Dryfoos</td>
<td>University Advancement</td>
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<td>Bob Ennes</td>
<td>Health Sciences Administration</td>
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<td>Joe Giffels</td>
<td>Office of Research</td>
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<td>Ruth Johnston</td>
<td>UW Bothell</td>
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<tr>
<td>Mary Fran Joseph</td>
<td>UW School of Medicine</td>
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<tr>
<td>Stephen Majeski</td>
<td>College of Arts &amp; Sciences</td>
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<tr>
<td>Aaron Powell</td>
<td>UW Information Technology</td>
<td></td>
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<tr>
<td>Thaisa Way</td>
<td>Faculty Senate</td>
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<tr>
<td>Bill Ferris, ex officio</td>
<td>UW Information Technology</td>
<td></td>
</tr>
<tr>
<td>Linda Rose Nelson, ex officio</td>
<td>College of Arts &amp; Sciences</td>
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### TRF Advisory Committee

<table>
<thead>
<tr>
<th>Member</th>
<th>Position</th>
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<tbody>
<tr>
<td>Bill Ferris</td>
<td>UW Information Technology</td>
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<td>Linda Rose Nelson</td>
<td>College of Arts &amp; Sciences</td>
<td>Co-Chair</td>
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<td>Maureen Broom</td>
<td>UW Medicine</td>
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<tr>
<td>Jason Campbell</td>
<td>Planning &amp; Budgeting</td>
<td></td>
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<tr>
<td>Kelly Campbell</td>
<td>Evans School</td>
<td></td>
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<tr>
<td>Gary E. Farris</td>
<td>School of Dentistry</td>
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<tr>
<td>David Green</td>
<td>School of Medicine</td>
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<tr>
<td>Tim Rhodes</td>
<td>UW Bothell</td>
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<tr>
<td>Barbara Wingerson</td>
<td>Finance &amp; Administration</td>
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<tr>
<td>Betsy Bradsby, ex officio</td>
<td>Research Accounting &amp; Analysis</td>
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### IT Service Management Board

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<thead>
<tr>
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<tbody>
<tr>
<td>Michael Middlebrooks</td>
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<td>School of Medicine</td>
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<tr>
<td>Chuck Benson</td>
<td>Facilities Services</td>
<td></td>
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<tr>
<td>John Drew</td>
<td>The Graduate School</td>
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<tr>
<td>Bob Ennes</td>
<td>Health Sciences Administration</td>
<td></td>
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<tr>
<td>Jan Eveleth</td>
<td>UW Information Technology</td>
<td></td>
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<tr>
<td>Brent Holterman</td>
<td>UW Information Technology</td>
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<tr>
<td>Ivy Mason</td>
<td>College of Arts &amp; Sciences</td>
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<td>Jim Phelps</td>
<td>UW Information Technology</td>
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<tr>
<td>Tim Rhoades</td>
<td>UW Bothell</td>
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<tr>
<td>Matt Saavedra</td>
<td>Registrar’s Office</td>
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<td>Diana Sartorius</td>
<td>Environmental Health &amp; Safety</td>
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<td>Jennifer Thompson</td>
<td>School of Nursing</td>
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<tr>
<td>Karalee Woody</td>
<td>UW Information Technology</td>
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<tr>
<td>Mary Mulvihill, ex officio</td>
<td>UW Information Technology</td>
<td></td>
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</table>
EVALUATION RECOMMENDATIONS

> Improve discussion and engagement
  – Prioritize Critical IT issues for inclusion in this year’s agenda
  – Plan agenda to allow time for discussion
  – Engage board in discussion on each agenda item

> Improve information flow between boards
  – Add standing agenda item to provide an overview of discussion at other board
> Critical IT issues identified by both boards include the following categories:

– Teaching and learning
– Research support
– Administrative systems modernization (Finance Transformation, Workday – HR/P, and data integrations)
– Managing data
– IT Security and Privacy
– Other (central and decentralized IT, software site licensing, service optimization, Transformative IT, regional partnerships)
CRITICAL IT ISSUES – RECOMMENDATIONS

Recommended priorities for discussion this year:

> Finance Transformation
> Data Analytics
> Managing data
  – Data Management Committee
> Transformative IT
  – UW-IT 3-5 year strategy
  – UW-IT projects and investments

Board input

> Are these the right issues?
> Anything missing?
> Other?
UW Enterprise IT Projects Update

Aaron Powell  
Vice President, UW-IT and Chief Information Officer

Erik Lundberg  
Assistant Vice President, Research Computing & Strategy, UW-IT
<table>
<thead>
<tr>
<th>Project</th>
<th>Oversight Level</th>
<th>Overall Risk &amp; Project Health</th>
<th>Budget Rating</th>
<th>Schedule Rating</th>
<th>Scope Rating</th>
<th>Issues Rating</th>
<th>Actual Cost (To Date)</th>
<th>Budget (Project Life)</th>
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<tbody>
<tr>
<td>Clinical Transformation Program</td>
<td>3 - UW</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>$2,650,000</td>
<td>$159,500,000</td>
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<td>Finance Transformation Readiness</td>
<td>3 - OCIO</td>
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<td>4</td>
<td>$12,342,016</td>
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<td>Pharmacy Inventory Management System</td>
<td>2 - UW</td>
<td>10</td>
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<td>2</td>
<td>2</td>
<td>3</td>
<td>$200,353</td>
<td>$1,033,000</td>
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<td>Academic Personnel Applicant Tracking System</td>
<td>2 - UW</td>
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<td>3</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>$1,457,147</td>
<td>$3,915,507</td>
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<td>Burke Museum CRM</td>
<td>2 - UW</td>
<td>11</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>$129,337</td>
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<td>F&amp;A Space</td>
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<td>TBD</td>
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<td>Transportation System Improvement Project</td>
<td>1 - UW</td>
<td>9</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>$2,947,868</td>
<td>$3,316,350</td>
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<td>Continuum College CRM</td>
<td>1 - UW</td>
<td>17</td>
<td>3</td>
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<td>5</td>
<td>$700,678</td>
<td>$1,165,911</td>
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Completed

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<tr>
<th>Project</th>
<th>Oversight Level</th>
<th>Go Live Date</th>
<th>Project Completion Date</th>
<th>Total Project Cost</th>
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<tr>
<td>...</td>
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<td>...</td>
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<td>...</td>
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</table>
QUESTIONS
Technology Recharge Fee FY 2020
Recommendation and Review

Bill Ferris
Chief Financial Officer, UW-IT
TRF Advisory Committee Members

> Bill Ferris, UW Information Technology, Co-Chair
> Linda Rose Nelson, College of Arts & Sciences, Co-Chair
> Maureen (Mo) Broom, UW Medicine
> Jason Campbell, Planning & Budgeting
> Kelly Campbell, Evans School of Public Policy & Governance
> Gary Farris, Graduate School
> David C. Green, School of Medicine
> Tim Rhoades, UW Bothell
> Barbara Wingerson, Finance & Facilities

> Ex Officio (non-voting):
  Betsy Bradsby, Research Accounting & Analysis
TRF Advisory Committee Charge

Support the IT Service Investment Board (SIB) in its annual review and assessment of the Technology Recharge Fee by providing analysis, identifying issues and making recommendations.

Timeline
TRF Committee >> Svc Investment Board >> Provost
Fall 2018        Winter 2018/2019    March 2019
### TRF Rate History

<table>
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<tr>
<th></th>
<th>FY11*</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
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<tr>
<td>Medical Center**</td>
<td>$53.43</td>
<td>$53.43</td>
<td>$53.43</td>
<td>$50.00</td>
<td>$50.00</td>
<td>$50.91</td>
<td>$51.34</td>
<td>$51.34</td>
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<td>Campus</td>
<td>$52.68</td>
<td>$52.68</td>
<td>$52.68</td>
<td>$54.50</td>
<td>$54.50</td>
<td>$55.51</td>
<td>$56.13</td>
<td>$56.13</td>
<td>$57.28</td>
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</table>

Rebalancing of Rate

Incr. to Campus: 1%  .6%  0%  2%

*The initial TRF coincided with a $20/month reduction of the Dial Tone rate, a $6M annual savings to campus

** Excluded from GOF/DOF Subsidy: Network & Telecom billed separately to Medical Centers resulting in an effective rate: $83.69
Proposal for FY 2020 – TRF Rate

- Maintain fundamental cost allocation methodology used for prior TRF
- UW-IT FY 2019 budget as base
- Workday now the data source for Headcount
- No increase to overall funding base
  – Modest change to each rate based on cost allocation by service
    > Campus rate increase = +0.25
    > Medical Center rate decrease = -0.45
TRF Rate - Process

Use FY 2019 UW-IT Budget as Base

Total Cost by Funding Type by Customer Group

<table>
<thead>
<tr>
<th>Business Service</th>
<th>FY20 Budget (Modified FY19)</th>
<th>TRF Allocation to User Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FY20 Univ Supported</td>
<td>FY20 Self-Sustaining</td>
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<tr>
<td>Accessibility Resources</td>
<td>1,014,167</td>
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<tr>
<td>Ancillary Admin Systems</td>
<td>1,345,561</td>
<td>1,152,850</td>
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<tr>
<td>Application Developer Platform</td>
<td>1,788,289</td>
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<tr>
<td>Computing and Storage</td>
<td>16,007,640</td>
<td>-</td>
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<tr>
<td>Consulting</td>
<td>73,580</td>
<td>-</td>
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<tr>
<td>Customer Experience Management</td>
<td>2,657,424</td>
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<td>Data Analytics</td>
<td>6,900,207</td>
<td>6,074,747</td>
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<tr>
<td>Data Centers</td>
<td>3,739,422</td>
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<tr>
<td>Data Networks</td>
<td>21,870,804</td>
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<tr>
<td>Document Management</td>
<td>1,377,507</td>
<td>1,976,391</td>
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<td>Emergency Preparedness</td>
<td>343,154</td>
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<td>Enterprise Architecture</td>
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<td>(12,782)</td>
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<td>Financial Systems</td>
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<td>5,796,830</td>
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<td>Identity and Access Management</td>
<td>3,380,269</td>
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<td>Information Security and Privacy</td>
<td>3,551,940</td>
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<tr>
<td>Infrastructure Tools</td>
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<td>Instructional Apps</td>
<td>3,447,164</td>
<td>-</td>
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<td>Productivity Suite</td>
<td>4,183,396</td>
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<td>1,515,584</td>
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<td>Software Licenses</td>
<td>4,214,481</td>
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<td>Telecommunications</td>
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<td>UW-IT Administration</td>
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<td>1,393,002</td>
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<td>Total</td>
<td>167,054,490</td>
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TRF Rate for FY 2020

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<thead>
<tr>
<th>Customer Group</th>
<th>TRF Rate</th>
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<tbody>
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<td>Med Ctr Employee</td>
<td>$51.75</td>
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<tr>
<td>Campus Employee</td>
<td>$57.53</td>
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</table>

Apply GOF/DOF
Divide by Headcount
## FY 2020 TRF Recommendation

<table>
<thead>
<tr>
<th>TRF Monthly Rate</th>
<th>FY19</th>
<th>FY20</th>
<th>$ Increase</th>
<th>% Increase</th>
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<tbody>
<tr>
<td>Med Center Employee*</td>
<td>$52.20</td>
<td>$51.75</td>
<td>-$0.45</td>
<td>-0.8%</td>
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<tr>
<td>Campus(s) Employee Admin/Academic **</td>
<td>$57.28</td>
<td>$57.53</td>
<td>$.25</td>
<td>0.4%</td>
</tr>
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</table>

No net new funding for UW-IT

*Excluded from GOF/DOF Subsidy; Medical Centers Network & Telecom billed separately. Effective Medical Center rate ~$85.00

** Supplements existing GOF/DOF resources to provide Basic Services
Budget Risk for FY 2020

Microsoft Campus License Agreement

> Currently negotiating with Microsoft on annual campus license renewal to be effective May 1, 2019
> Microsoft moving from a FTE/Part FTE model to a “knowledge worker”
> Could result in a significant fiscal impact
UW-IT

Provost Annual Budget Process – FY 2020

Request for Provost Reinvestment Funds
Path for New Investments

> Strategic Use of UW-IT Reserves (Temp)
  – Integrations for Finance Transformation ($1M-$2M)
  – Workday HR/P Technical Debt ($400K)
  – Cybersecurity ($400K/Year)
  – Infrastructure Resilience ($400K/Year)

> Provost Reinvestment Funds
  – Teaching & Learning/Student Systems
  – Research ($500K in FY19 + $500K in FY20/21)

> Technology Recharge Fee
  – Inflationary costs for basic service

> Student Technology Fee
  – Limited by statute
  – Opportunities to support student research (HPC & Cloud)
Cybersecurity Risk

“How much investment is needed to reduce the UW cybersecurity threats to a minimum level of acceptable risk?”

<table>
<thead>
<tr>
<th></th>
<th>FY 2018</th>
<th>FY 2019</th>
<th>FY 2020</th>
<th>FY 2021</th>
<th>FY 2022</th>
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<tbody>
<tr>
<td>CISO Budget</td>
<td>$2.2M</td>
<td>$2.6M</td>
<td>$3.3M</td>
<td>$4.0M</td>
<td>$4.7M</td>
</tr>
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</table>

Address risk with 2.1M in increased funding, phased in over the next 3 years: 9 new staff as well as $400K for subscriptions, licenses, hardware, software and training ($700K/year incremental)

FY 2020 Request:
- Provost Reinvestment Funds - $500K
- UW-IT Match - $200K
Student Systems

Undergraduate Admissions Modernization

FY 2020 Request:
Provost Reinvestment Funds - $240K Ongoing support

Planning for Student System Replacement
> Future Request
UW Finance Transformation

Brian McCartan
Vice President for Finance, UW Finance & Administration
UW Finances Highly Decentralized/Distributed
DECENTRALIZATION RESULTS IN INEFFICIENCIES

- **UW Spends** $226 m on finance & procurement & supply chain annually - *~twice as much as peers*
  - 3,000 positions touch finance/procurement, 1,700 FTE equivalent.

- **UW Academy** is less efficient than peers in most areas
  - +750 finance systems

- **UW Medicine is more centralized** and has headcount and process costs more similar to their peers

- **1,046 Academy staff reported spending <=30% of their time in Finance and Procurement activities; this is not their primary role**
  - This does not include people who spend <10% of their time on these activities as they were likely not reported

---

**Finance Headcount and Cost Gaps**

- Cost gap to peer $53.5M
- Cost gap to peer $4.87M

1) Analysis includes FTEs who perform more >= 10% of their time on the respective process
2) Academy includes SoM; Medicine excludes Valley Medical Center and SoM
Since the Roadmap for Administrative Systems Modernization in 2008, UW has been on a path towards Financial Transformation, which each stepping stone building on the last
2017 Conceptual Estimate
Scope:
- Phase 1: Financials, Procurement
- Phase 2: Budget/Planning
- $200m, Funding TBD

Schedule:
- 3 year "Big Bang"

Jan 2018-July 2019
Readiness Phase
- University-wide engagement
- FT Governance Structure

Scope
- How to organize UW financial work to maximize efficiency and drive down annual cost?
- How to integrate Workday into UW technology environment?

Schedule
- Given other initiatives – what is optimal schedule?
- What is the trade off between big bang and phasing?

Budget/Funding
- What are the final costs? How do we allocate these? How can we reduce annual operating costs to pay for the program?

Summer 2019: Baseline Project
Scope:
- Set
Schedule:
- Set
Cost Set: Funding Set
UWFT Governance Structure

- Board of Deans & Chancellors
- Accounting Advisory
- Process Transformation Teams
- Sponsor Team
- Program Leadership Team
- Core Transformation Team
- Technical Leadership Team
- Program Team
- UW Medicine Advisory
- Technical Advisory
- Faculty Advisory

Administrators are highly engaged

*Administrative leadership for program team is VP Finance
Goal: Rationalize Finance and Procurement Processes, Systems & Data
Core Elements of Financial Transformation

> Commonality
> Simplification
> Rationalize transactions to gain efficiency
> Consolidate computing infrastructure
> Lessons learned on implementation from HRP

Key Benefits

> Single system of record
> Timely, accurate, consistent reporting
> Better data for decision making
> Lower costs
> Improved security, redundancy
Progress to Date

> Organizational
  – Hired AVP
  – Director level team in place, 20 staff hired in total
  – Governance structure fully running
  – Communication plan, charters in place
  – Readiness partner in place – Deloitte Consulting

> Project
  – Leadership retreats and alignment work
  – Operational model sessions
  – HRP remediation workshops underway
  – IT strategy workshops

> Project status
  – Budget (green), Scope (green), Schedule (Yellow), Resources (Red)
QUESTIONS
Project Sequencing and Prioritization

Aaron Powell
Vice President, UW-IT and Chief Information Officer
QUESTIONS
Major Projects for Board Oversight

Erik Lundberg
Assistant Vice President, Research Computing & Strategy,
UW-IT
Wrap Up
March Agenda

> UW-IT projects and investments
> Microsoft Site Licensing
QUESTIONS AND DISCUSSION
APPENDICES
APPENDICES:
Critical IT Issues - Details
Critical IT Issues

> Teaching and Learning
  – Data analytics dashboards (rapid access to student data)
  – Wi-Fi needs to be pervasive
  – Adaptive technologies in classroom (universal design)
  – Need to answer the question at an institutional level – are we adopting a single strategy for the University or having each campus, school/college, department adopt its own based upon individual needs?

> Examples: different student analytics systems at UW Tacoma and UW Bothell; Continuum College; different admissions processes

> Research Support
  – The University under-invests in research computing support
Administrative Systems Modernization

– Need to clarify and communicate overall long-term institutional strategy

> Finance Transformation

– Need an institutional funding strategy that doesn’t rely on taxes
– Need to address capacity issues, including how the University will support FT along with other major projects
– Need to incorporate lessons learned from HR/Payroll
– Need to ensure early engagement from key stakeholders across the UW
– Need to address the impacts — both transformative and disruptive

> Workday – HR/P

– Need to address current issues and make the system work effectively for the UW

> Data integrations

– Need interoperability between administrative systems
– Need to recognize the complexities involved in data integrations, view as a priority, and adequately resource
> Managing Data
  – Need capability to manage data of increasing volume and complexity, while addressing cybersecurity issues
  – Need a strategic and holistic plan at the institutional level for how to manage data — it’s an issue of competitive advantage for the UW

> Security and Privacy
  – Need to scale-up cybersecurity, especially in the University’s decentralized environment, and with the emergence of the Internet of Things
  – Need to address how to protect clinical, student, and research data, especially with data intensive advancements such as genomics and precision medicine
  – Phishing is increasingly sophisticated and pervasive
Critical IT Issues (continued)

> Other issues

– **Central and decentralized IT**: need to leverage central, enterprise-wide IT to create efficiencies, use resources wisely

– **Software site licensing**: how to structure it to take advantage of economies of scale?

– **Service optimization**: what services can be decommissioned to create capacity for innovation?

– **Transformative IT** — a tendency to focus on risks versus the potential for IT to drive transformation (academic, clinical, and administrative)

– **Regional partnerships**: how the UW is connected to the larger network of regional and national partners