IT SERVICE INVESTMENT BOARD
January 30, 2020
AGENDA

> Call to order
  – Governance Board Update
> UW Finance Transformation Update
> Technology Recharge Fee FY 2021 Recommendation
> Evolving Privacy and Security Compliance Environment
  – Privacy and compliance
  – CISO security and compliance
> IT Project Portfolio Executive Review
> Wrap up
Governance Board Update

Christy Long
Assistant Vice Chancellor for IT and Chief Information Officer, UW Bothell
IT Governance Board Update

IT Strategy Board (Meets on February 10)
> No new update since last meeting on October 28

IT Service Management Board (meets monthly)
> Board has narrowed its list of 20+ recommendations down to seven, and is working on a recommendations report to be submitted to the Vice President for UW-IT and CIO in March
> The report will then be shared with the IT Strategy Board and IT Service Investment Board in the spring
> Recommendations focus on a culture shift towards University-wide adoption of enterprise solutions to create consistency across the student experience and efficiencies throughout the workforce
QUESTIONS
UW Finance Transformation Update

Ed Loftus
Assistant Vice President for Finance Transformation
UW FINANCE TRANSFORMATION IS AN OPPORTUNITY TO REIMAGINE AND STREAMLINE OUR FINANCE-RELATED POLICIES AND PROCESSES, WITH THE HELP OF NEW TECHNOLOGY
“Provide modern, flexible and integrated business information systems to support a complex, global research institution and access to better business information for planning and analysis.”

“A boundaryless transformation strategy is the very opposite of ripping-and replacing core systems every few years. Instead, it empowers organizations to evolve and refresh systematically, enabling the flexibility to incorporate rapid technology changes as they arrive.”

Accenture
SINCE WE LAST MET...

> In early summer, leadership from UWFT, UW-IT, UW Finance and UW Medicine went before the Board of Regents twice to review the work completed in Readiness, and secure approval to proceed to Design

  – The Design Phase was a 6-month period of time devoted to firming up this multi-year program’s scope, schedule and budget

  – UWFT went before the Board of Regents on December 12 to ask for Stage 2 funding. It was unanimously approved; we have a go-live date of July 1, 2022

> Engagement with stakeholders so far has been steady, but will grow significantly in frequency, and broaden in reach, beginning in 2020

  – Envisioning what could be: The program engaged in 45 workshop-style sessions in 2019

  – Efforts have been underway on the FDM, Operating Model and business process redesign

> New members of the UWFT Sponsor team include Mia Tuan and Bob Stacey. In addition, Mary Lidstrom joined for the duration of Design
PROGRAM ACCOMPLISHMENTS

JAN 2018

- ESTABLISH PROGRAM GOVERNANCE
- BENCHMARKING AND DATA-GATHERING, INVENTORIES
- FOUNDATION DATA MODEL BLUEPRINT 1.0
- HIGH-LEVEL PROCESS MAPPING AND HRP WORKSHOPS
- UWFT NEWSLETTER AND WEBSITE

READINESS

18 months

- WORKDAY “DEEP-DIVE SESSIONS”
- UNIT PROFILE REVIEWS
- FACULTY FOCUS GROUPS
- WORKING GROUPS, PEER OUTREACH

DEC 2019

- DRAFT SCOPE, SCHEDULE BUDGET
- BOR APPROVAL
- DIRECTIONAL OPERATING AND WORKDAY SUPPORT MODEL DECISIONS
- 9BOX ESTIMATES AND WORKDAY AMU PROTOTYPE SESSIONS

- FOUNDATION DATA MODEL 2.0 PILOT ENGAGEMENT

FINANCE TRANSFORMATION
UNIVERSITY of WASHINGTON
IMPLEMENTATION TIMELINE

JAN 2020

PLAN
2 months

ARCHITECT
7 months

CONFIGURE & PROTOTYPE
9 months

TEST
9 months

DEPLOY
3 months

JUN 2022

END-2-END TESTING

USER ACCEPTANCE TESTING (UAT)

END-USER TRAINING

TRAIN-THE-TRAINER

PAYROLL PARALLEL TESTING

PROCESS DESIGN WORKSHOPS

USER PLAYBACK SESSIONS

SYSTEMS DISPOSITION DECISIONS

DEFINED OPERATING MODEL

PROCESS TRANSFORMATION TEAMS AND USER TASK GROUPS

CHANGE CHAMPIONS
Plan Stage Objectives:
> Develop key foundational documents, such as the Program Management Plan, Work Plan, and Tenant Management Plan
> Plan the dates, duration and sequence of activities throughout the Architect stage
> Defines the team members (UW and Deloitte), roles and responsibilities, and communication plans to be used throughout the project

Architect Stage Objectives:
> Document Workday business processes design, integration, conversion and report requirements as well as organizational change impacts
> Process design workshops, led by the Design Team, and follow up further discovery sessions for integrations, conversions and report are critical path
> Discuss process requirements and current pain points
> Initiate knowledge transfer process with the System project team on Workday terminology and concepts
OPPORTUNITY: RE-THINK 9 BUSINESS PROCESS AREAS

- To truly transform, we will step out of our comfort zone and reconsider every aspect of the nine end-to-end business process areas
- Transformation goals have been developed for each
- Process Transformation Teams have been set up

<table>
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<th>NINE END-TO-END BUSINESS PROCESS AREAS</th>
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<tr>
<td>Asset Acquire to Retire</td>
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<td>Customer Requisition to Payment</td>
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<td>Hire to Retire (HRP Remediation)</td>
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<tr>
<td>Grant Award to Close</td>
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<tr>
<td>Manage Cash and Financial Assets</td>
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<td>Procurement and Supply Chain</td>
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<td>Project Inception to Close</td>
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<td>Plan and Manage the Business</td>
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<td>Record to Report</td>
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END-TO-END TRANSFORMATION GOALS

Overall, the University is aiming to achieve simplified, standardized and streamlined business processes.
WHAT IS AN OPERATING MODEL

AN OPERATING MODEL ANSWERS THE QUESTION: “WHAT IS THE BEST WAY TO ORGANIZE AND DISTRIBUTE FINANCE WORK?”

Our new operating model seeks to achieve the following transformation goals:

> Achieve greater efficiency and productivity
> Support higher value activities aligned with the mission
> Enable savings and other productivity gains
> Increase compliance
> Provide high quality, consistent customer service across units
FUTURE STATE OPERATING MODEL

The University has made a high-level directional decision to move toward an operating model where more business processes take place in a shared environment, where logical.

Specific financial processes will belong in one of three levels:

1. Enterprise-wide level (across the entire UW, including Academy and Medicine)
2. Organization-wide level (across Academy or Medicine)
3. Regional hub level

*Some processes will still remain at the unit level*
GO-LIVE IS NOT THE END...

...IT IS THE BEGINNING OF THE REST.
QUESTIONS
UWFT is Hiring – Help Share the News!

> Customize your own or send our message and links to your network
  – We have a template and images that can be used
  – Share via email or social networking apps

> Spread the word about our upcoming recruiting event (being held in partnership with UW-IT) at the end of February
UWFT is Hiring!

> We are looking for smart, driven, creative problem solvers who thrive in a fast-paced and constantly changing program environment:

- Project Management (PM) Analyst
- Senior Project Manager
- Senior Financial Business Analyst (multiple positions)
- Change Manager (multiple positions)
- Process Manager
- ERP Business Process Lead - Grant Award to Close
- ERP Business Process Design Lead - Order-To-Cash
- ERP Business Process Lead - Record to Report
- ERP Business Process Lead - Customer Requisition to Payment
Technology Recharge Fee FY 2021

Recommendation

Linda Rose Nelson
Director of Finance and Administration, College of Arts & Sciences
TRF Advisory Committee Recommendation

> Maintain current TRF rate model/methodology for next 3 years
  – Recognizing:
    > Current model is out of date and requires workarounds
    > Future impact of FT including: new Foundational Data Model (FDM) and ongoing operating costs related to integrations (EDW)
> Defer major TRF revamp until implementation of FT – either for FY 2023 or FY 2024
  – Larger committee – reconfigure model/methodology
  – Include impact of FT on cost of services
  – Incorporate new service costing model – major changes to FDM will impact ability to do cost accounting (UW-IT will not maintain a side system)
Cybersecurity - Investment for FY 2021

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

> Investment Plan to address cybersecurity risk with 2.1M in increased funding, phased in over the 3 years (FY 2020-2022):

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<th>FY 2018</th>
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<th>FY 2020</th>
<th>FY 2021</th>
<th>FY 2022</th>
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> New Funding in FY 2020 – $700k
  - Provost Reinvestment Funds $500k + UW-IT $200k

> Propose TRF Investment in FY 2021 - $250K
  - + Provost Reinvestment Funds $250k + UW-IT $200k = $700K

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<th>Additional Cybersecurity Funding</th>
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<td>Technology Recharge Fee (TRF)</td>
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<td>Total</td>
<td>$700K</td>
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Recommended TRF Rate for FY 2021

> Minor adjustments to base rate due to changes in cost allocation
> Include new permanent investment of $250K for Cybersecurity

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<th>TRF Monthly Rate Comparison</th>
<th>FY20 TRF Rate</th>
<th>FY 2021 Base Rate</th>
<th>FY 2021 w/ CISO $250K</th>
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<td>57.53</td>
<td>57.62</td>
<td>58.28</td>
<td>$0.75/1.3%</td>
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> Addition of NW Hospital and UW Physicians implemented in Workday 1/1/2020
    – Headcount ~1,950 – UWMC and ~550 – School of Medicine (approx. 20% increase)
    – UW Neighborhood Clinics – date TBD (approx. 250 people)
    – Impact on cost of basic services is incremental across UW-IT

– Recommendation:
  – Integrate into TRF model/methodology after Finance Transformation
  – Short Term – UW Medical Centers to directly fund 2 FTE to support biggest impact areas: Identity & Access Management, Windows Engineering, and Microsoft Collaborative Applications
## Addendum: TRF Rate History

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<th>FY11</th>
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<th>Rebalancing of Rate</th>
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<th>2%</th>
<th>0.5%</th>
<th>1.3%</th>
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- TRF supplements existing GOF/DOF resources to provide Basic Services
- Medical Centers are excluded from GOF/DOF subsidy and billed separately for Network & Telecom resulting in an effective rate ~$85/mo.
- The initial TRF coincided with a $20/month reduction of the Dial Tone rate, a $6M annual savings to campus
ACTION: Endorsement of this Recommendation
Evolving Privacy and Security Compliance Environment
Privacy and Compliance

Ann Nagel
University Privacy Officer
Associate Vice Provost for Privacy
Data Protection Officer for EU GDPR
UW Privacy Office / Academic and Student Affairs
Privacy, Information Security and Compliance

> Creating consistent understanding of distinct concepts

> Embracing evolving needs

UW Privacy Office
- Strategy and policies for appropriate collection, management, and use of personal data
- Privacy and data governance
- Privacy impact and risk assessments
- Privacy by design advising
- Management of incidents and data breaches involving personal data

UW Office of the CISO
- Advising
- Education and Awareness
- Forensic Analysis and Incident Management
- Governance and Policies
- Threat Intelligence and Risk Mitigation

UW Compliance Services
- Structural support and coordination for institution-wide compliance efforts

Privacy
Values, principles, policies and practices about appropriate collection, management, use and governance of personal data

Information Security
Strategy, processes, and tools to prevent, detect, mitigate, and counter threats to information assets in order to provide confidentiality, integrity and availability.

Compliance
Obligations under federal, state and local laws and regulations
Privacy Landscape

Privacy Around the Globe

> Emerging laws and regulations with significant fines or penalties (e.g., European Union General Data Protection Regulation)
> Evolving public sentiment
> Varying expectations
> 2018 “...four of the world’s 10 largest economies with new data protection laws...”*
> 2019 Statues/Bills – 17 states proposed new privacy legislation
> Talk of new Federal privacy law/regulation

Privacy in Washington

> 2019 Changes to Data Breach Notification Requirements
> 2020 Legislative Session – 14 bills introduced as of 1/16/20
> Proposed Privacy Act was lead story for International Association of Privacy Professionals on 1/14/20

*International Association of Privacy Professionals – EY Annual Privacy Governance Report 2018
Privacy at UW

UW Privacy Office

> Established: 2017
> Reporting Relationship: VP Academic and Student Affairs
> FTE: 3 (including AVP for Privacy)
> Goal: Create a University-wide strategy and structure for aligning UW’s approach to protecting privacy of personal data at all UW locations.

Step 1
Address Significant Gaps
Create privacy office and identify immediate gaps that need to be addressed

Step 2
Assess privacy across the enterprise
Establish an enterprise privacy assessment for evaluating the current state of maturity of privacy at UW

Step 3
Develop Strategy and Roadmap
Develop an accountability strategy and roadmap

Step 4
Plan and Execute
Create a plan based on the strategy and execute the plan based on resources available
Success Stories

> Established values and principles for privacy

UW vision and strategic priorities reflect the core values and culture that reaffirm the UW as a great and unique University.

Privacy principles are the commitments and considerations to which the UW's collection and use of personal data should always be anchored.

Privacy by design is an approach for protecting personal data by embedding privacy considerations and practices throughout an organization’s operations, business processes, information systems, and technologies.
UW Privacy Office

Success Stories

> Completed an enterprise privacy assessment and prioritization effort
> Developed various policies and supporting resources
> Supported data sharing with vendors, contractors, and other third parties
> Increased privacy literacy
> Managed various incidents and data breaches
> Advised UW departments with numerous privacy by design related matters
Privacy at UW

Risk: Insufficient resources to address high priority activities

> Appropriate collection and use of sensitive/special categories of personal data
> Data processing registry (e.g., what types of personal data are held where and for what purpose)
> Data flows (e.g., between systems, processes, countries)
> Data privacy in research practices
> Records retention practices
> Data classification (i.e., confidential, restricted, public)
> Valid consent for processing personal data
> Interoperability of public records, privacy laws, and/or UW values and principles for privacy
> Secondary uses of personal data
> De-identification, anonymization, and pseudonymization
> Emerging laws for biometric data, facial recognition software, etc.
PRIVACY OR PRIVACY RELATED COMPLIANCE QUESTIONS
CISO Security and Compliance

Braden Vinroe
Director, CISO Cybersecurity Advising, UW-IT
Information Security and Compliance

Changes from Olympia:
> 2020 legislative session
> WA Office of the CIO
  – Nationwide Cybersecurity Review (NCSR)
  – National Institute of Standards and Technology (NIST) Cybersecurity Framework (CSF)

Changes from Washington DC:
> Cybersecurity Maturity Model Certification (CMMC)
  – All companies doing business with the DoD
  – Level 1: Defense Federal Acquisition Regulation Supplement (DFARS) 252.204-7012
  – Level 3: NIST SP 800-171 – minimum for Controlled but Unclassified Information (CUI)
> NIST SP 800-171

Other changes:
> European Union General Data Protection Regulation (GDPR)
> California Consumer Privacy Act (CCPA)
Information Security and Compliance

What are we going to do?
Good security leads to better compliance

> Revise APS 2.6 Information Security Controls and Operational Practices
  – Create a security standard
  – Revise security guidelines and templates
  – Promote UW-IT security related services

> Implement security and compliance for Hyak supercomputer

> Implement security and compliance in cloud environments (Amazon, Google, Microsoft)

> Training and awareness
Information Security and Compliance

What is the minimum investment needed to reduce UW cybersecurity risks to an acceptable level?

> Security by design
> IT Vendor Risk Management Program
> Back to basics – implementation of best practices
> Security Community of Practice
> Risk: insufficient resources
  – Hire security staff
  – Train security staff
  – Retain security staff
Collaborative Leadership – Privacy, Information Security and Compliance

**PRIVACY**
Values, principles, policies and practices about appropriate collection, management, use and governance of personal data

**INFORMATION SECURITY**
Strategy, processes, and tools to prevent, detect, mitigate, and counter threats to information assets in order to provide confidentiality, integrity and availability.

**COMPLIANCE**
Obligations under federal, state and local laws and regulations
QUESTIONS
IT Project Portfolio Executive Review

Erik Lundberg
Assistant Vice President, Research Computing & Strategy, UW-IT
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<th>Project</th>
<th>Sponsor</th>
<th>Oversight Level</th>
<th>Overall Risk &amp; Project Health</th>
<th>Budget Rating</th>
<th>Schedule Rating</th>
<th>Scope Rating</th>
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Wrap Up
QUESTIONS AND DISCUSSION