AGENDA

> Call to Order
> IT Governance Updates
> Student Information Systems Current State
> Enterprise Standards: Revising APS 2.3
> UWFT Combined Quarterly Report
> UW Finance Transformation
> IT Project Portfolio Executive Review
> Wrap up
IT Governance Updates

Erik Hofer
Associate Vice President for Academic Services, UW-IT
Student Information Systems Current State

Erik Hofer
Associate Vice President for Academic Services, UW-IT
The foundation of our Student Information System (SIS) is a large, mainframe application developed at the UW over the past 40 years.

This homebuilt application is augmented by a collection of complementary applications that are either built in-house (using a variety of technology stacks) or licensed from vendors and integrated into the ecosystem.

A major initiative to overhaul this systems ecosystem is anticipated, but is some years off.

- Institutional capacity
- Lack of viable solutions on the market

The institutional strategy to date has been to leverage the historical investments in these systems as much as possible.
Background (2)

> In recent history, the SIS has required continual development work to keep up with evolving institutional demands
  – Operations and Maintenance also has to include some degree of non-discretionary enhancement work
> External factors contribute to operations and maintenance costs
> Over the past several years, evolving student needs and institutional demands have led to a series of modernization projects to address major functional gaps
  – MyPlan
  – Undergraduate Admissions Modernization
  – Financial Aid Modernization
> These modernization projects have led to increases in the costs to operate and maintain these system
# Student Systems – Temporary Funding

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*Source: Provost Reinvestment Funds (UW-IT & Enrollment Mgmt)

** In FY15, partial funding for MyPlan from STF

Provost/OPB has provided temporary funding for these modernization initiatives, with no funding for ongoing support.
Student Admin System - Budget

Permanent Funding: $4.4 M
- GOF/DOF/TRF

Current FY21 Budget: 6.0 M

Labor & Non-Labor – (Servers, Kuali)

Funding Gap*: -$1.6M

Use of “Carryover Funds” related to temporary investments has covered the gap through end of FY21.
Issues

1. The need for “project capacity” remains due to continued institutional and external change

2. The current foundation of permanent funding does not cover the operations and maintenance of the SIS
   a. Use of UW-IT Reserves
   b. Cost saving measures
   c. Temp dollars from partners to address some new major enhancements, but do not address (and exacerbate!) the underfunding of O&M

3. The Student Program is in the midst of a wave of retirements of long time technical staff, leading to challenges of both institutional knowledge and reduced capacity while new staff are onboarded

4. With a full transformation effort several years off, we **should** be investing in a set of projects to ensure that the SIS is operable until a replacement can be adopted
Discussion / Next Steps

> The structural deficit is real, and UW-IT’s reserves to lessen the impacts will not hold out much longer

> How might we balance current financial constraints with downstream operational risk?

> How might we accommodate a high rate of change and churn in the academic / student space in a period of very constrained resources?
QUESTIONS
Enterprise Standards: Revising APS 2.3

Jim Phelps
Director of Enterprise Architecture & Strategy
“At the direction of the VP for UW-IT and CIO of UW, Enterprise Architecture (EA) helps stakeholders maximize the architectural value of their services, solutions, data, processes, or organizations on behalf of the UW in an environment of constant change. The EA team is accountable to the broad, long-term interests of the UW and advocates for decisions that make the most of the UW’s investments. The Director of EA will arbitrate architectural tradeoffs where they occur.”

The scope of the standards are meant to be UW-wide services and technologies not just UW-IT services.
APS 2.3 history

First drafted in July 2005 as a joint effort with the Strategy Board.
A couple of recent examples

> UWFT - Deloitte
> IT Service Management Board
UWFT – Deloitte asking...

“Where are the standards that we need to comply with?”

Because we didn’t have any, UWFT caused a lot of spin and swirl around things we thought were “decided” already.
SMB: Enterprise Service Management Investment

“The UW Connect Service is now utilized by 25 UW Schools/units ... there is a recognized need for continuing to advance a UW-wide Service Management approach supported by shared practices, templates, and tools. ... An Enterprise Service Management Investment to minimize this barrier would support scale and repeatable processes and create a common platform facilitating collaboration and service delivery across organizational boundaries.”
SMB: 25Live

“Implementing 25Live will improve efficiency at multiple levels in multiple offices across all three campuses. Instead of a chaotic playing field, it provides a single source for scheduling/room assignment needs. Additionally, it can reduce the cost spent by multiple offices implementing multiple solutions. UW-Tacoma has already seen that happen with a nearly complete implementation across its campus. By implementing 25Live as an enterprise-wide solution, users looking for spaces could find them in a single online location without having to search all around campus.”
Accelerate Decisions

Improve User Experience

Good Stewards

Building a Community
Why? What is my (EA) goal for this?

> **Decision Making** - Reduce the noise of false choices, reduce the tyranny of choice. Accelerate decision making where the answer is obvious.

> **Reducing Complexity / Technical Debt** - using one tool to solve the same problem is better than using and managing many tools.

> **Leveraging Investment** - both in technology and staff / training.

> **Security, Resiliency, etc.** - Easier to manage one solution such that it meets the “ities”* than many solutions.

*Steven Carmody*, IT Architect at Brown University and friend of R.L. Bob, introduced me to the idea of “The Ities” way back in 2002. See examples from other institutions at the end of this deck.
How will standards be developed?

Based on best practices
- High level approaches to technology, applications, data, and business architecture
- From experience in higher education, IT, and related industries

Community sourced
- Developed by contributors at the UW
- Grounded in existing practices and feasible goals
- Facilitated by the EA team
What is this NOT meant to do?

> **Stifle Innovation** - we will still want to pilot new solutions and new tools. We will need a good way of doing those pilots. *Edge - Leverage - Core* is key.

> **Force misfit solutions** - if the standard doesn’t fit, then let’s find a solution. Try the standard first. See if it meets the business needs before buying something else.

> **Command and Control local decisions** - it should help local decisions move faster if step one is obvious - *try the solution, if it works, great we’re done.*
What I don’t know:

> We would need to determine and document what the funding model is for each standard as it is developed.

> We would need to decide what the enforcement level would be (should vs. must) for each standard.
Final questions

> Do you support this vision and the direction and approach to standards?

> Do you support drafting changes to APS 2.3 to insert setting of IT Standards as part of the CIO role?
Thank You.

Questions or Comments: phelpsj@uw.edu
SMB Recommendations – Feb. 2020

SMB Recommendations from 2020 include things that look like standards

“The top seven IT Service Management Board recommendations are:

1. Enterprise Service Management investment
2. Standardize and consolidate Admissions applications and review systems
3. Implement Student Database improvements and application interface
4. Develop a centralized online software registry
5. Develop and publish guidance for “pre-qualified” Customer Relationship Management systems
6. Promote and support the implementation of 25Live for space scheduling and management
7. Adopt Zoom as the preferred campus-wide solution for video conferencing and collaboration”
Good peer examples of standards

- University of Wisconsin - Madison
- University of Michigan
- Harvard University
- Miami University
- Penn State University
Example red-line edits to APS 2.3

These slides are examples of the types of changes that we would be making to APS 2.3

Change:

“The Vice President for UW Information Technology and Chief Information Officer (Vice President for UW-IT and CIO) has delegated authority in Executive Order No. 63 to provide leadership, guidance, and oversight, and leads standards work for all aspects of IT investments. In addition, the University's IT governance boards have oversight responsibilities for IT investments.”

Change:

“Note: The office of the State CIO may from time to time make changes to the policies, standards and requirements for IT project approvals. Any subsequent changes will be reflected as updates in the UW-IT Investment Procedures, and those updates will prevail over the requirements defined in this policy.”

Change:

Accordingly, every University information technology (IT) acquisition and project must comply with:

- All federal and state legal requirements;
- The rules and policies of the state of Washington including the state's Chief Information Officer (State CIO), the University's Board of Regents, and any relevant funding agencies;
- The provisions of this policy;
- The University of Washington Information Technology (UW-IT) Investment Procedures; and
- Standard IT Solutions.
7. Exemptions from University Approval and Oversight

An acquisition and/or project may be exempt from University approval and oversight (small project exemption) when that acquisition and/or project is under a certain cost (initially $1 million in total project cost, and under $2.5 million in system life cost), is a Level 1 project, and the impact is within a single department. These projects should still align with and leverage the Standard IT Solutions where feasible.

A project or acquisition does not qualify for this small project exemption if any of the following is true:

- Requires use of central administrative systems or resources, including, but not limited to, new data interfaces or integrations
- Is in conflict with a Standard IT Solution (i.e., would replace or replicate the Standard IT Solution)
QUESTIONS
UWFT Combined Quarterly Report

Erik Lundberg
Assistant Vice President, Research Computing & Strategy, UW-IT
### UW FT Combined Program

**Executive Summary - December 31, 2020**

<table>
<thead>
<tr>
<th>Project</th>
<th>Sponsor</th>
<th>Organization</th>
<th>Overall Risk &amp; Project Health *</th>
<th>Budget Rating</th>
<th>Schedule Rating</th>
<th>Scope Rating</th>
<th>Resource Rating</th>
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<td>Aaron Powell</td>
<td>UW-IT</td>
<td>Red</td>
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<td>$240,000</td>
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#### Unit Readiness

- **Overall readiness of academic, medicine and administrative units**
  - Rating: (C) New
  - Description: Piloting a unit readiness dashboard process that leverages unit readiness leads to track and status unit-level readiness
  - Cost: $0
  - Budget: $0

#### Side System Remediation

- **Overall status outside the Core Implementation Program and Collaboration Partners**
  - Rating: (C) New
  - Description: Piloting a resource allocation process to engage units in streamlining scope of work and effort required for remediation efforts, at unit level
  - Cost: $0
  - Budget: $7,134,000

**Total:** $60.5M | $269.2M

#### Notes:

(A) The UW FT Integrated Program is a composite of the core UW FT Program, and the four Collaboration Partner Projects; with ratings computed as the average of all five constituent projects; except that Schedule is 'maximum' of others.

(B) The core UW FT Implementation Project status will be shown in this Combined Program Summary, along with the four Collaboration Partner projects. The status of the 'FT Combined' effort will be shown on the main Quarterly Summary Report. Cost figures for the core UW FT Implementation Project shown here are exclusive of cost and budget for the four Collaboration Partners and other remediation efforts, but do include the initial Readiness Phase. All cost and budget figures are as of Oct 30, 2020.

(C) Engagement with departments and units outside the core program and Collaboration Partners is beginning. Budget is a placeholder value.

#### Project Health Key

- **Improvement over previous quarter**
- **Setback from previous quarter**

*(over for FT Workstream status breakdown)*
<table>
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<tr>
<th>FT Workstream</th>
<th>Director</th>
<th>Overall Status</th>
<th>Dependencies</th>
<th>Status - as of early December, 2020</th>
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<tr>
<td>Program Operations</td>
<td>Leslie Jones</td>
<td>![Green]</td>
<td>![Yellow]</td>
<td>The core program team has worked with the collaboration partners to build a preliminary version of an integrated plan. However, the planning process has highlighted additional areas where increased levels of detail are needed to inform continued integrated planning efforts.</td>
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<tr>
<td>OCM</td>
<td>Jeff Bishop</td>
<td>![Green]</td>
<td>![Green]</td>
<td>Currently on track with all deliverables.</td>
</tr>
<tr>
<td>Design</td>
<td>Christina Mercer</td>
<td>![Green]</td>
<td>![Yellow]</td>
<td>On track with business process development, FDM maturity, and has an active configuration tenant. Confirmation sessions were completed on time. Collaboration partner organizations are concerned that further business process/FDM maturity is needed in order for integrated planning work to continue.</td>
</tr>
<tr>
<td>Operating Model</td>
<td>Libby Hartman</td>
<td>![Yellow]</td>
<td>![Green]</td>
<td>Over the last quarter, UW leadership asked to review additional models for post go-live operations, resulting in new work around the design of the operating model and associated end-to-end business processes. Given the new model development, the team is on track. However, this has pushed out the overall design completion by a quarter.</td>
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<tr>
<td>Technical</td>
<td>Manoj Joshi</td>
<td>![Green]</td>
<td>![Yellow]</td>
<td>While there has been significant progress made in the integrations space, there are concerns regarding Data Conversion, scope of system remediation work, and overall data management within the full UW enterprise. The technical complexity within the systems landscape at the UW is high, with correlated high levels of dependency from units and partners. The coming quarter will focus on driving higher levels of clarity in the technical space.</td>
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<tr>
<td>Alignment</td>
<td>Paula Ross</td>
<td>![Yellow]</td>
<td>![Green]</td>
<td>Work on HRP Remediation is well underway and on track. There have been delays in progress around reporting inventory and reporting strategy development. Additionally, there is new concern regarding the program’s ability to achieve appropriate levels of testing given the complex interactions of systems within the UW. Test strategy development is underway.</td>
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### † Workstream Overall Status Key
- ![Green] Workstream is on track to complete current Phase, with minimal issues or impacts on budget, scope, schedule or resources. Or there may be some risk, but it is being addressed and mitigated.
- ![Yellow] Workstream is at substantial risk to fully complete scope on schedule with current budget and resources.
- ![Red] Workstream is at critical risk of not completing current Phase scope or deliverables on schedule.

### † Workstream Dependencies Key
- ![Green] Workstream is on track to provide information to other dependent partner projects to design their solution and deliver on schedule.
- ![Yellow] Workstream is at substantial risk of providing information to other dependent partner projects in time to design their solution and deliver on schedule.
- ![Red] Workstream is at critical risk for providing information to other dependent partner projects in time to design their solution and deliver on schedule.
UW Finance Transformation - Discussion

Aaron Powell
Vice President for UW-IT and CIO
Operating Model Timeline

- **Nov - Dec**: Direction Refined & Questionnaire Responses Collected
- **Feb - June**: Engage with Units & Finalize Operating Model and Support Structure.
  - Hold 'more detail' sessions
  - Determine WHAT and HOW to close information gap
  - Do ‘Get Messy’ with units that selected Org Wide SE or don’t know (Feb)
  - Finalize Cost Model for all SEs
  - Finalize placement of units in Ent SE, Unit SE (May)
  - Build out org model with budget/funding for Org wide (central) SE (Apr)
- **Feb - May**: Org Wide (central) Shared Environment Sizing & Costing, Finalize Funding Model
- **Feb - ?**: Unit/Org-Wide (central) Shared Environment Stand-up
- **April - ?**: Workforce Transition
  - Design and build Unit SE Toolkit
  - Begin configuration of UW Connect
  - Begin WD/UW Connect Integration work
- **tbd**: Training/Enablement
- **tbd**: Workday Go-Live

**Org Wide & Enterprise-Wide Impacts**

**Design Support**

**Policy Harmonization**
Operating Model Activity During AVS

- **Held “Shared Environment Deep Dives”** to walk unit administrators through the four end-to-end business processes (Customer Requisition to Payment, Grant Award to Close, Procurement and Supply Chain, and Record to Report) aligning to Shared Environments.

- **UWFT created questionnaires outlining key criteria** (e.g., capacity, competency, compliance, operational sustainability) and **3-digit org units completed initial self-assessments** about their desire and ability to manage the specific responsibilities that would potentially make up their own Shared Environment.

- **Unit administrators provided feedback** that in order to make decisions about their unit’s Shared Environment alignment (either serving as their own or joining an org-wide Shared Environment), “more detail” was needed about structure and exactly how each process and hand-off would work.

- **UWFT hosted two interactive “Need More Detail” sessions** asking administrators to provide their specific questions. The first session was attended by ~130 administrators from all 37 units and the second session gathered questions from administrators considering the potential org-wide shared environment.
  - General topic areas included: 1) cost model, 2) customer service model, 3) process / transaction flows, 4) governance, and 5) security roles.
Sample - Key Questions, “Need More Detail” Sessions

GOVERNANCE

- What will be the values and principles for governance?
- What will be the governance structure?
- How will governance issues and concerns be addressed?
- How will the governance structure be communicated?
- How will stakeholders inform the governance structure?
- How do we define success for governance (KPIs)?
- Where do responsibilities reside (training)?

FUNDING MODEL / UNIT COSTS

- How does UWFT plan to charge departments differently based off of usage of shared services?
- Has the final funding model been defined and decided and how does this incorporate the complexities of “colors of money”?
- Are units expected to fund shared services through a “recharge” or “pay by use” model?
- Or will units be expected to shift funds to “central”?
- If so, would shifting funds to “central” result in a reduction of budget authority for the units? (We care about this because loss of budget authority at the unit level increases our risk, especially as we enter into phased budget reductions.)

CUSTOMER SUPPORT MODEL

- We currently use centrally available user guides. Will we have those for new model? Who will create and manage these?
- Would like a tie to policy. We don’t have that today but...if I look up a policy and want to apply it, tell me how I go about executing it.
- How are workflows changing with unit-based shared environments?
- Who is deciding things? Will unit hubs decide restrictions? Will there be central oversight of things like security roles, internal controls, etc.?
- Who trains new faculty and staff when they come on?
Sample - Key Questions, “Need More Detail” Sessions

**SECURITY ROLES**

- What is **definition of the security roles** (who sees what and how, what can the role initiate, what they can do and not do)?
- What is **functionality** of each security role?
- What is **determination of role delegation** (who's deciding, how many are allowed per unit and unit SE, how are they constrained)?
- What is **training** for security roles?
- What is **management** of security roles?

**PROCESS / TRANSACTION FLOWS**

- Are there **other process flows that would see Shared Environment involvement** (specific to grants)?
- What is the **beginning and end of the transaction** if it occurs outside of Workday?
- What are the **savings in staff work** in our school as we will **still have to use a system (ServiceNow) to submit everything**? Can you explain what savings we will have in my unit?
- We understand the guidance is to have our Shared Environment individuals in Workday 75% of the time; what is the **reason for this requirement**? Is **Workday more complex than the systems we use today** (where our staff spend smaller fractions of their time)?
- If we form our own Shared Environment, **will we be given ALL of the Workday roles necessary to execute the Shared Environment tasks** noted in the process flows? (For example, in Workday HRP we have a lot of simple processes that we can't execute without the ISC.)
Operating Model Next Steps

- A focus on **closing the gap on knowledge and understanding**:
  - Analyze learnings of “Need More Detail” sessions.
  - Determine what we currently have that addresses questions and identify what new content needs to be created to address questions.
  - ‘Pilot’ detailed new content / visuals with small groups to ensure efficacy.
  - Identify how best to communicate content to close the gap on knowledge and understanding.

- Collaboratively **determining the cost of the org-wide shared environment**:
  - Identify total cost of running an org-wide shared environment.
  - Identify options for charging for shared environment services (by FTE, by transaction, etc.).
  - Hold “Get Messy” session for units who selected this choice or are still undetermined (outcome is to have current data on FTEs doing work today that will be in shared environment tomorrow).
  - Model out costs for units based on their current transaction level.
  - Determine funding and charge model.

- **Reach final decisions**:
  - The beginning of May is targeted for final decisions about the operating model – specifically, which units will elect to be served by what type of shared environment.
  - These decisions will be the result of collaborative discussions among unit administrators, Deans, the Executive Office, and UWFT.
QUESTIONS
IT Project Portfolio Executive Summary

Erik Lundberg
Assistant Vice President, Research Computing & Strategy, UW-IT
## UW Enterprise IT Projects

### Project Portfolio Executive Summary - December 31, 2020

<table>
<thead>
<tr>
<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>
<th>Resource Rating</th>
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<td>Advancement CRM Replacement</td>
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<td>Clinical Trials Management System</td>
<td>John Slattery</td>
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<td>$59,000</td>
<td>$216,000</td>
</tr>
<tr>
<td>Transportation System Improvement Project</td>
<td>John Chapman</td>
<td>1 - UW</td>
<td>Final</td>
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<td></td>
<td></td>
<td>$3,301,000</td>
<td>$3,401,000</td>
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<td>Finance E-Commerce/Touchnet</td>
<td>Brian McCartan</td>
<td>1 - UW</td>
<td>Final</td>
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<td></td>
<td></td>
<td></td>
<td>$243,000</td>
<td>$1,000,000</td>
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<tr>
<td>Public Records</td>
<td>Ann Anderson</td>
<td>1 - UW</td>
<td>(B)</td>
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<td>$379,000</td>
<td>$887,000</td>
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<tr>
<td>EvanTEL</td>
<td>Alison Cullen</td>
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<td>Gradescope</td>
<td>Aaron Times</td>
<td>1 - UW</td>
<td></td>
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<td></td>
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<td>$58,000</td>
<td>$85,000</td>
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<tr>
<td>Audit/Compliance of Unstructured Network Data</td>
<td>Xiao-Ping Chen</td>
<td>1 - UW</td>
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<td></td>
<td></td>
<td></td>
<td>$59,000</td>
<td>$60,000</td>
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</tbody>
</table>

**14 projects**

**Notes:**

(A) Details of the UWFT Core Project and Collaboration Partners are shown on a separate "Combined FT" Summary.

(B) COVID-19 has impacted four projects: D1, DAWG, CTMS (all three due to resourced needed during peak of current surge), and Public Records (due to impact on vendor technical resources).

(↑ for Program Operations impacts)

Improvement over previous quarter

(↓ for Program Operations impacts)

Setback from previous quarter
<table>
<thead>
<tr>
<th>Program Operations</th>
<th>Executive Leadership</th>
<th>Major Projects Interdependencies Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated Service Center</td>
<td>Ann Anderson</td>
<td>UW Enterprise</td>
</tr>
<tr>
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<tr>
<td>UW-IT</td>
<td>Aaron Powell</td>
<td>UW Enterprise</td>
</tr>
<tr>
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<td></td>
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<td></td>
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</table>

**Completed Projects - Mar 31, 2020**

<table>
<thead>
<tr>
<th>Project</th>
<th>Sponsor</th>
<th>Oversight Level*</th>
<th>Go Live Date</th>
<th>Project Completion Date</th>
<th>Total Project Cost ($K)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LQI</td>
<td>Susan Camber</td>
<td>2-UW</td>
<td></td>
<td>Aug, 2020</td>
<td>$453,424</td>
</tr>
</tbody>
</table>

Note: ISC and UW-IT resources are tracked within the major projects’ budgets.
**UW Enterprise IT Projects**

### *Oversight Level Key*

1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.

2. OCIO approval required and regular project reporting. Quality Assurance (QA) reporting required, maybe internal or external. OCIO may recommend project to be full Technology Services Board (TSB) oversight.

3. High severity and/or high risk, subject to full TSB oversight, which includes TSB approval, written reports to the TSB, periodic status reports to the TSB by the agency director and staff, and submission of other reports as directed by the TSB. External QA reporting required.

### *Project Health Key*

<table>
<thead>
<tr>
<th>Overall Risk Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5-10</td>
<td>Green</td>
</tr>
<tr>
<td>11-17</td>
<td>Yellow</td>
</tr>
<tr>
<td>18-25</td>
<td>Red</td>
</tr>
</tbody>
</table>

- **Overall Risk Rating of 5-10 is Green**
  - Project is on time, on budget, and within defined scope, with minimal issues.

- **Overall Risk Rating of 11-17 is Yellow**
  - Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays, cost or scope changes.

- **Overall Risk Rating of 18-25 is Red**
  - Major changes to scope, budget or resources have placed project at critical risk. One or more of the following must change in order to proceed: project schedule, resources, budget, scope.
QUESTIONS AND DISCUSSION