

IT SERVICE INVESTMENT BOARD

March 11, 2020

INFORMATION TECHNOLOGY

UNIVERSITY *of* WASHINGTON



AGENDA

- > Call to order
 - Introductions
 - Governance Board Update
- > Novel Coronavirus (Covid-19)
- > IT Service Management Board Recommendation for Investment
- > UW Finance Transformation Update
- > Technology Recharge Fee Update
- > UW-IT Strategy 2020
- > Wrap up

Governance Board Update

Aaron Powell

Vice President, UW-IT and Chief Information Officer



IT Governance Board Update

IT Strategy Board (February 10)

- > **UW Finance Transformation update:** Discussion focused on the following key points:
 - Coordination and sequencing of work between UWFT and UW-IT, and ensuring UW-IT dependencies on program deliverables are visible and accounted for in the schedule
 - QA and concerns about whether the consultant is providing adequate external review and sufficiently highlighting program risks. In response, the Board was provided with the January QA report.
 - Change management and HUBS, with a question about whether there is adequate time in the schedule for change management in units. It was noted that a key element will be the ongoing support that units receive from the shared service HUBS; success in this area is a major risk. This has been a challenging area for other peer institutions.
- > **UW-IT Strategy 2020: Academic Administration Strategy:**
 - An overview of UW-IT's new strategic framework was presented, with a focus on the proposed strategy for supporting academic administration. The strategy recognizes that academic units pursue appropriate solutions given their unique needs and constraints. The Board agreed this is the right approach.

IT Service Management Board (meets monthly)

- > The Board is presenting its recommendations report to the Vice President for UW-IT and CIO in March, and then will share it with the IT Service Investment Board on March 11, and the IT Strategy Board at its April 29 meeting.

QUESTIONS

Novel Coronavirus (Covid-19)

Aaron Powell

Vice President, UW-IT and Chief Information Officer



QUESTIONS

IT Service Management Board Recommendation for Investment

Mike Middlebrooks

Director of Information Technology, School of Medicine



SERVICE MANAGEMENT BOARD

*Identify opportunities to build capacity,
both within UW-IT and throughout campus*

TALKING POINTS

- > The top 7 recommendations
- > What do they have in common?
- > Which are actionable in the near-term?
- > Where is more discovery needed?
- > What recommendations didn't make the list?
- > Next steps discussion...

TOP 7 RECOMMENDATIONS

Each of the top items have an underlying need for a **cultural shift** and a purpose related to **driving campus consistency**

All are **important**

Encourage common use of tools and processes to create overall UW **efficiencies** and create **capacity** for staff

TOP 7 RECOMMENDATIONS

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

TOP 7 RECOMMENDATIONS

Actionable in the **near term**

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Informative in a **larger strategic context**

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IN PRODUCTION NOW

Actionable – High Organizational Readiness

> Service Management - UW Connect

- While there is interest from additional units, the cost of the current service is a barrier to adoption
- Also the top recommendation of the 2018 SMB Report

> 25Live

- 25Live is already licensed and available for use by all three campuses, but a lack of campus awareness hinders adoption

> Zoom

- Zoom Pro is widely used at the UW, but generally only by departments who can afford the monthly license cost

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EXPLORATION NEEDED

Informative – Require more discovery before action

- > Admissions Systems Consolidation
- > Student Database Improvements and Interface
- > Online Software Registry Development
- > Development of CRM Guidance

THE “OTHER” 16 (PART ONE)

Items with at least one vote...

Votes	Recommendation
4	Office 365 Email Security Improvements
4	Enhanced large-scale Storage Offering for Protected Data, PHI, HIPAA, etc.
3	Faculty Activity / Promotion & Tenure tools with API for local reporting, website publication, etc.
1	OASIS Modernization (Asset Inventory)
1	FISMA Moderate Research Environment – Secure Research Computing Environment
1	Identify “Strategic Services” and create marketing push for wider adoption
1	Modernize DHCP service to eliminate Public IP Scopes
1	Consulting Service: Cloud Integration Guidance
1	Increase scope of IAM person registry to include personal master data (name, preferred pronoun, etc.)

The top 7 each received either 7, 8, or 9 votes

THE “OTHER” 16 (PART TWO)

Items with no votes...

Votes	Recommendation
0	Continue UW-IT Leadership Development Program (LDP)
0	Consulting Service: Disaster Recovery Planning
0	High Performance Computing in a PHI Protected Space
0	Research Administration Support: Pre-award grant facilitation
0	Recommend potential services to sunset in favor of investment in other services
0	UW NetID Management Tool Modernization
0	Cloud Tech Solutions for Classrooms

These are still important pain points to call out.

QUESTIONS/INPUT

UW Finance Transformation Update

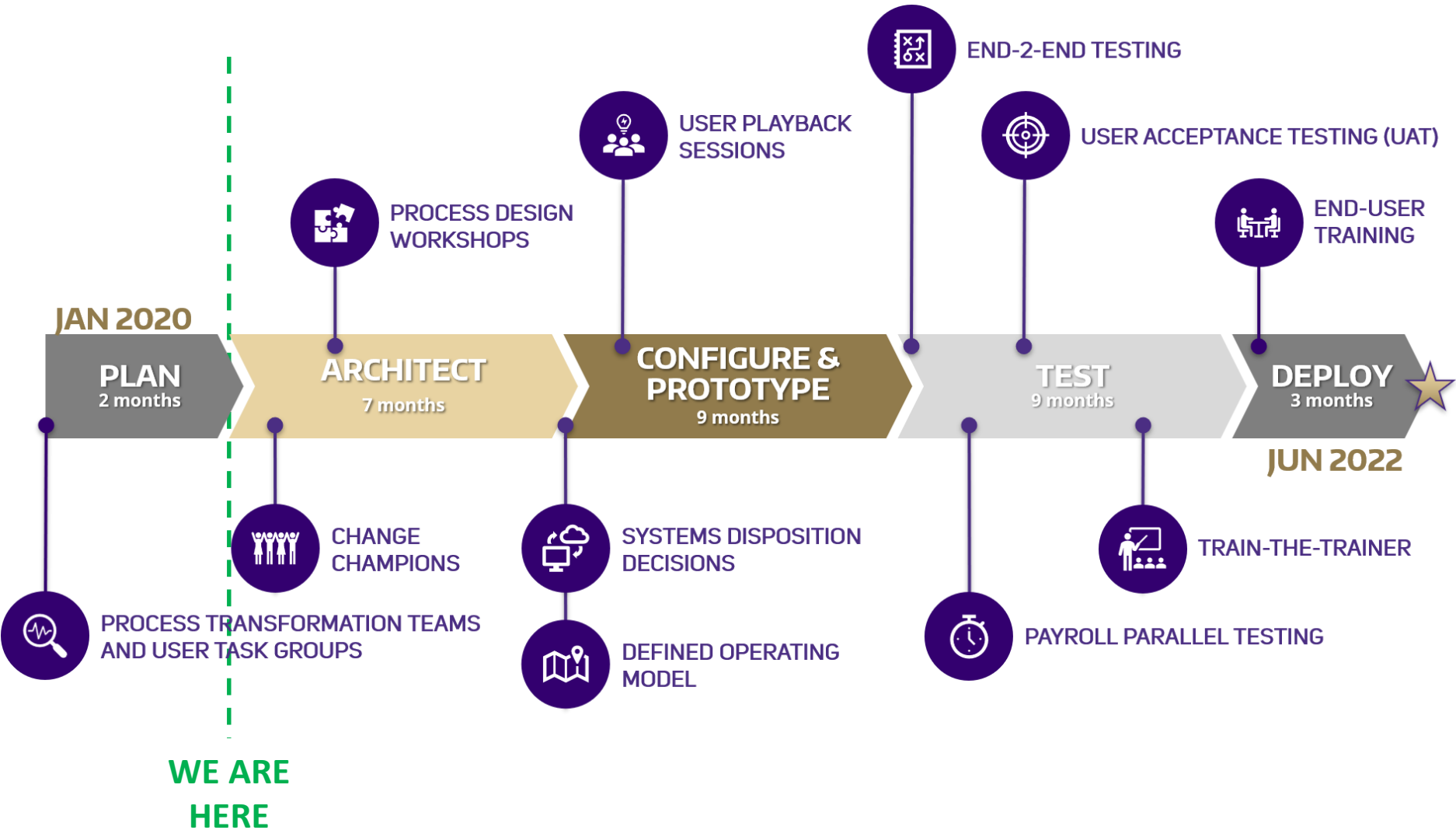
Ed Loftus

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***

IMPLEMENTATION TIMELINE






Transforming how and where we do the work

WHERE SHOULD FINANCE WORK BE PERFORMED?

Unit Level Finance Work

Processes that are unique or specific to an individual unit

Defining Shared		
Location	Definition	Example of Activities
 Enterprise Wide (EW)	Process can be shared by all of UW	<ul style="list-style-type: none"> Enterprise consolidation Enterprise policy and procedures Travel and Expense Compliance Maintenance of Master Data (e.g. vendor master, customer master, foundation data model)
 Org-wide (OW)	Process can be shared by all of UWA or UWM , but not across both organizations	<ul style="list-style-type: none"> Cash Application and Collections (Misc. AR) Org-level close and financial statements
 Regional Hub (RH)	Process can be shared at a Regional Level via a hub (serving more than one major organization/major unit) (e.g. Across multiple schools/colleges, administrative units, auxiliary units and/or campuses. For larger schools and colleges this could be across multiple depts/divisions)	<ul style="list-style-type: none"> Initial point of contact for units for finance and supply chain questions Transaction processing (e.g. purchase orders, travel & expenses entry, invoice generation) Post award grants management analysis and reporting

WE ARE DEFINING OUR GUIDING PRINCIPLES...

DRAFT SHARED SERVICES DEPLOYMENT PRINCIPLES

- 1 Shared services should enable process standardization.**
- 2 Avoid re-work.**
- 3 Minimize Workday go-live risk.**
- 4 Establish foundation to achieve efficiency target.**
- 5 Shared services should not be opt-in (*We should avoid having 'opt-in' shared services, as doing so will result in inconsistent processes across the organization and complex Workday configuration*)**
- 6 Hubs stood-up by the time Workday is live (*All Regional hubs will be stood-up and operating by the time Workday is live*)**
- 7 Build on existing shared services efforts.**
- 8 Local Unit Knowledge.**

OUR JOURNEY – PLAN AND ARCHITECT STAGES

Preparing for phasing and conducting End-to-End Process Design Workshops

 January 2020

 Feb/Mar 2020

 March 2020

 April – Sept 2020



Prioritize End-to-End Process Inventory

- ✓ Evaluate processes
- ✓ Identify core vs. strategic
- ✓ Align on prioritized processes for Process Design Workshops

Prioritize Policies for Harmonization

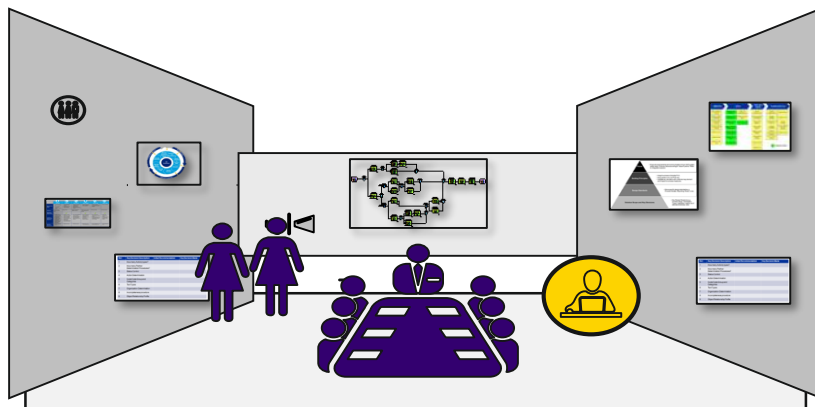
- ✓ Inventory policies and owners
- Review and prioritize policies

Shared Services Deployment Approach POV

- Provost & president review guiding principles
- Agree on POV of how target shared services should be deployed (i.e. which processes should go before, concurrent with, and after Workday)

End-to-End Process Design Workshops

- Conduct workshops for each end-to-end process area
- Capture key decisions made and action outputs/next steps



**September 2020
Shared Services Final
Decision**

DRAFT – FOR DISCUSSION PURPOSES ONLY

GO-LIVE IS NOT THE END...



...IT IS THE BEGINNING OF THE REST.

QUESTIONS

Technology Recharge Fee Update

Bill Ferris

Chief Financial Officer, UW-IT



FY 2021 Technology Recharge Fee Approved by Provost

TRF Monthly Rate	FY 20	FY 21	\$ Increase	% Increase
Med Center Employee*	\$51.75	\$52.18	\$.43	0.8%
Campus(s) Employee Admin/Academic	\$57.53	\$58.28	\$.75	1.3%

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

- > Includes new permanent investment of \$250K to address cybersecurity risk
- > Maintain the existing cost/rate allocation methodology until after Finance Transformation

QUESTIONS



UW-IT Strategy 2020

Aaron Powell

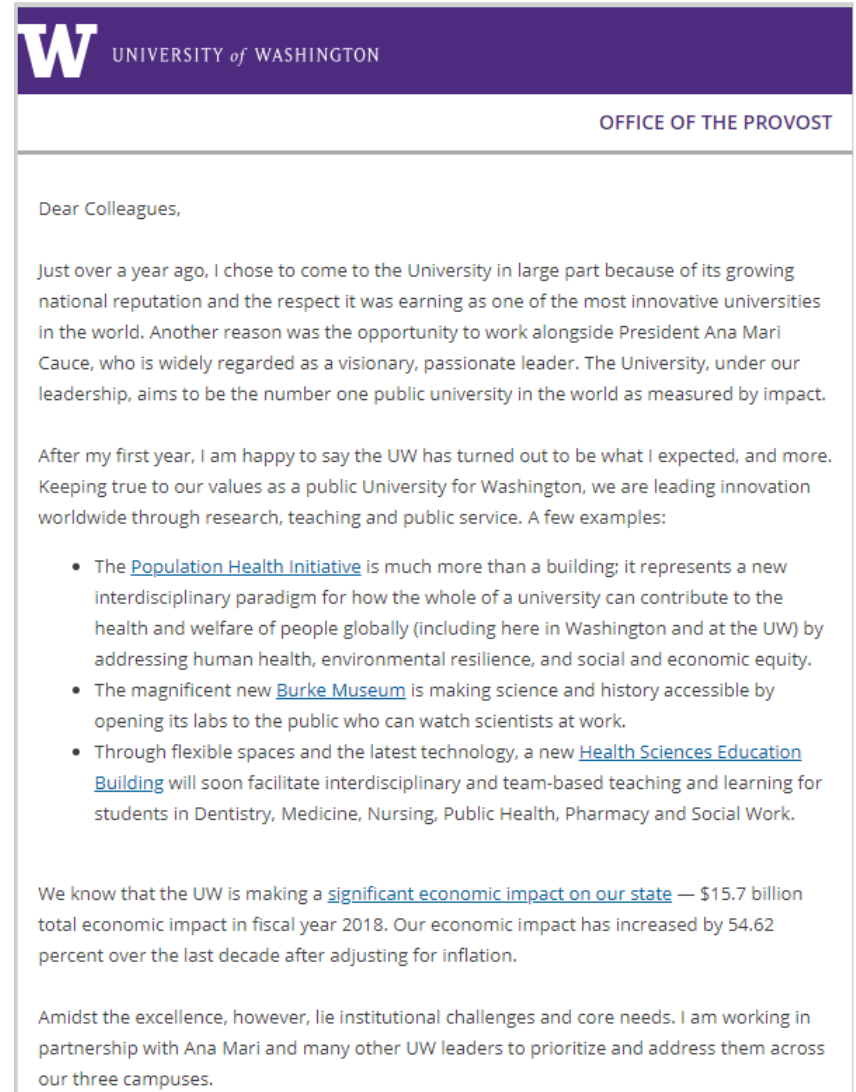
Vice President, UW-IT and Chief Information Officer



Making Core Investments to Advance our Mission

We are playing the long game to build a better university, and to secure a more stable foundation for serving our students and the state of Washington in the future.

- Provost Mark Richards



The image is a screenshot of an email from the University of Washington Office of the Provost. The header features the University of Washington logo and name. The email is addressed to 'Dear Colleagues' and discusses the provost's first year at the university, highlighting its growing reputation and the leadership of President Ana Mari Cauce. It lists several key initiatives: the Population Health Initiative, the Burke Museum, and the Health Sciences Education Building. The email also mentions the university's significant economic impact on the state and addresses institutional challenges.

W UNIVERSITY of WASHINGTON

OFFICE OF THE PROVOST

Dear Colleagues,

Just over a year ago, I chose to come to the University in large part because of its growing national reputation and the respect it was earning as one of the most innovative universities in the world. Another reason was the opportunity to work alongside President Ana Mari Cauce, who is widely regarded as a visionary, passionate leader. The University, under our leadership, aims to be the number one public university in the world as measured by impact.

After my first year, I am happy to say the UW has turned out to be what I expected, and more. Keeping true to our values as a public University for Washington, we are leading innovation worldwide through research, teaching and public service. A few examples:

- The [Population Health Initiative](#) is much more than a building; it represents a new interdisciplinary paradigm for how the whole of a university can contribute to the health and welfare of people globally (including here in Washington and at the UW) by addressing human health, environmental resilience, and social and economic equity.
- The magnificent new [Burke Museum](#) is making science and history accessible by opening its labs to the public who can watch scientists at work.
- Through flexible spaces and the latest technology, a new [Health Sciences Education Building](#) will soon facilitate interdisciplinary and team-based teaching and learning for students in Dentistry, Medicine, Nursing, Public Health, Pharmacy and Social Work.

We know that the UW is making a [significant economic impact on our state](#) — \$15.7 billion total economic impact in fiscal year 2018. Our economic impact has increased by 54.62 percent over the last decade after adjusting for inflation.

Amidst the excellence, however, lie institutional challenges and core needs. I am working in partnership with Ana Mari and many other UW leaders to prioritize and address them across our three campuses.

UW-IT Strategy 2020

Good technology, well-delivered, for a better University

**Enhance the student
experience**

**Advance world-class
research**

**Enable academic
administration**

**Modernize UW business
administration**



**Support the
workforce**

**Build technology
foundations**

**Manage
enterprise risk**

QUESTIONS

Wrap Up



QUESTIONS AND DISCUSSION

INFORMATION TECHNOLOGY

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