

**IT SERVICE
INVESTMENT
BOARD**

January 26, 2022

INFORMATION TECHNOLOGY

UNIVERSITY *of* WASHINGTON



AGENDA

- > Call to order
- > Welcome and introductions
- > VP for UW-IT and CIO search update
- > TRF status update
- > Financial implications of Google Workspace for Education
- > Review IT Service Management Board recommendations
- > UWFT Combined Quarterly Report and IT Project Portfolio Executive Summary
- > Wrap up/Adjourn

VP for UW-IT and CIO Search Update

Anind Dey

Dean, The Information School



QUESTIONS

TRF Status Update

Bill Ferris

Chief Financial Officer, UW-IT



QUESTIONS

Financial Implications of Google Workspace for Education

Erik Hofer

Associate Vice President for Academic Services, UW-IT



Changes from Google

- > In early spring 2021, Google announced significant changes to its productivity platform, now called Google Workspace for Education
- > Google Workspace for Education imposes a limited pool of storage on the service and other changes
- > UW entered into an initial 4-year agreement with Google to license the Google Workspace for Education Plus service
 - ~\$400K / year
 - Initially funded from UW-IT reserves

Open Financial Issues

- > Engineering enhancements to cover gaps in functionality
- > Migration support for end users
- > Long-term service sustainability
 - Licensing
 - Labor
- > Storage pool management and overall risk
- > Shared drive uncertainty
 - Potential recharge if technically feasible

QUESTIONS

Review IT Service Management Board Recommendations

Mike Middlebrooks

Director of Information Technology, School of Medicine

Thayer York

Director of Technology Services, School of Law and Chair, IT Service
Management Board



Key Discussion Points

- > SMB Leadership Change
- > A Look Back
- > The Objective, the Charge, and the Pivot
- > The 2021 SMB Recommendations
- > What's Ahead?

SMB Leadership

> Chair

- 2018-2021

 - > Mike Middlebrooks, IT Director, School of Medicine

- 2021-Present

 - > Thayer York, Director of Technology Services, School of Law

> UW-IT Representatives

- Mary Mulvihill, Director, Service Management Office, UW-IT

- Felicia Watson, Director of Communications Solutions & Relationship Management, UW-IT

- Jacob Morris, Director, Strategic Initiatives and Projects, UW-IT

A Look Back

> February 26, 2020

—Published “Recommendations for Services and Campus Consistency” report

> March 6, 2020

—UW announces move to remote instruction and work

> March 11, 2020

—2020 SMB Report presented to SIB via Zoom

2020 SMB Recommendations (Recap)

Published February, 2020:

“Actionable in the near term. Informative in a larger strategic context.”

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

Kicking Off the 2021 Effort

We started with two questions:

1. Do the SMB recommendations published in February of 2020 still hold true when viewed through today's "COVID lens?"
2. Knowing what we know now, would we prioritize anything differently?

Kicking Off The 2021 Effort

**The objective,
the initial charge,
and the resulting pivot**

2021 SMB Recommendations

Published October, 2021:

“Recommendations for Increasing Efficiency and Capacity”

1. Improve Procurement Processes for Software and Software As A Service
2. Promote the use of centrally funded software, services, and tools
3. Identify and drive efficiencies in application/admissions systems, processes, and data management
4. Enable a Learning Management System for employee compliance training and workforce development

2021 SMB Recommendations

1. Improve Procurement Processes for Software and Software As A Service

> Opportunity

- Improve the value of IT spend at the University by creating an enterprise process to steward the procurement of third-party software.

> Recommendation

- In collaboration with UW Procurement, UW Privacy, and the UW Accessibility Office, UW-IT should establish a business unit to provide coordinated consultation, vendor negotiation support and oversight for the purchase of software and SAAS.
- Improve transparency and enterprise visibility for UW Contracts and departmental agreements for IT goods and services.
- UW-IT should partner with UW Computing Directors to sustain the UW Distributed IT Software Registry database.

2021 SMB Recommendations

2. *Promote the use of centrally funded software, services, and tools*

> Opportunity

- Improve tri-campus efficiency by promoting increased adoption and utilization of the software, services, and tools already available to the entire University community, through either the Technology Recharge Fee or central funding, at no additional cost.

> Recommendation

- Develop and socialize the concept of a campus standard for applications and services that specifies the use of centrally-funded solutions as the “first choice.”
- Actively campaign and advocate for the adoption and use of solutions that are centrally funded.
- Provide and advertise both lightweight (self-service) and deep-dive training resources for centrally-funded solutions to ensure broad adoption, improved skillsets, and long-term success.

2021 SMB Recommendations

3. Identify and drive efficiencies in application/admissions systems, processes, and data management

- > Opportunity
 - Drive standardization across undergraduate, graduate, and professional programs on all three campuses, where there are at least 15 different admissions systems currently in use.
- > Recommendation
 - UW Bothell and UW Tacoma have deployed Slate for undergraduate admissions. Seattle should examine the Slate software towards the goal of a single solution for undergraduate admissions at all campuses.
 - All applicant admissions systems should support automated integration with the Student Database to streamline staff workflows and decrease the need for manual data entry.
 - Facilitate data sharing and empower a single data governance team to ensure admission data is consistent and of high quality.

2021 SMB Recommendations

4. Enable a Learning Management System for employee compliance training and workforce development

> Opportunity

- Implement centrally provided Learning Management System (LMS) to enable a ‘one-stop-shop’ employee experience, enhance the quality of training, improve responsiveness to changing compliance needs, decrease duplicative efforts, and facilitate reporting.

> Recommendation

- Identify a platform and funding for a standard tri-campus employee Learning Management System (LMS) focused on delivering compliance training and workforce development.
- Identify and evaluate existing campus LMS implementations for possible opportunities to extend to the tri-campus community.

What's Ahead?

- > New chair, new members
- > Identifying focus for 2022
- > CIO transition

QUESTIONS

UWFT Combined Quarterly Report and IT Project Portfolio Executive Summary

Erik Lundberg

Assistant Vice President, Research Computing & Strategy,
UW-IT



UW FT Combined Program

Executive Summary - 12/31/2021

Project	Sponsors & Leaders	Program Area	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
Finance Transformation Combined Program	Mark Richard Chris Mercer	UW	● (A)	●	●	●	●	●	\$149,364,000	\$339,906,000
Functional	Paula Ross	Program	↑	●	●	↑	●	↑	\$14,435,479	--
Technical	Gail Rogers	Program	↓	●	●	↓	●	↓	\$21,682,076	--
Change Management	Jeff Bishop	Program	↑	↓	●	●	↑	●	\$4,136,869	--
Project Management	Elise Barho	Program	●	●	●	●	●	●	\$4,558,155	--

Enterprise Systems Remediation

UW Medicine	Sarah Cantwell	●	●	●	●	●	●	●	\$7,026,670	--
Research Administration	Ryan Green	↑	●	↑	↑	●	↑	●	\$5,445,673	--
Finance Readiness Program	Jeanne Marie Isola	↓	↓	↓	↓	↑	●	●	\$4,825,656	--
Integrated Service Center	Greg Koester	●	●	●	●	●	●	●	\$817,439	--
UW-IT	Rob McDade	↓	●	↓	●	●	●	●	\$4,105,163	--

Departmental Systems Remediation (Campuses, Schools, Colleges, Departments, Auxiliaries)

Unit Readiness	Overall readiness of academic, medicine and administrative units	●	<p>The Systems Design Support (SDS) program has completed all sessions for Groups 1, 2, and several key systems that need special attention. The sessions for Plan and Manage the Business (PMTB) process area are delayed due to the Adaptive project and will run concurrently with that project. Retirement sessions are scheduled and will be starting in Jan. Outside of the SDS sessions, the program has not fully engaged with campus on topics such as testing and cutover.</p>	--	--
Side System Remediation	Overall status outside the Core Impl. Program and Collab Partners	●	<p>The TCM team is tracking progress as systems are remediated (e.g., plans, dates, current-future state mappings). Some systems are behind in their deliverables and escalations are proceeding to assist them. There is not enough for most systems to ascertain which cycle of End To End testing they will be ready to complete. The TCM team will be holding workshops and another conference in Q1 to support the units in various topics.</p>	--	--

9 separate projects under one Combined Program, plus 2 areas of work across the campus

Notes:

(A) The total cost and budget for the project include the initial Readiness project (\$23M). Also included in the central budget are Contingency, Reserves and Executive Director funds; and underspending within sub-projects will be moved to Reserves in the central budget on a monthly basis.

UW Enterprise IT Projects

Project Portfolio Executive Summary - 12/31/21

Project	Sponsor	Oversight Level *	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
Finance Transformation Combined Program	Mark Richard Chris Mercer	3 - OCIO							\$149,364,000	\$339,906,000
Advancement CRM Replacement	Julie Brown Dan Peterson	3 - OCIO							\$3,822,000	\$4,000,000
Clinical Trials Management System	John Slattery	2 - UW	<small>(A) final</small>						\$12,257,000	\$15,704,000
UWM Data Analytics Warehouse	Mo Broom, Richard Goss	2 - UW							\$3,718,000	\$5,031,000
Electronic Document Management System Replacement	Anja Canfield- Budde	2 - UW							\$513,000	\$1,100,000
Continuum Online Apps	Marlon Buchanan	2 - UW	<small>cancel</small>						\$213,000	\$600,000
MSIM Online Program Management	Anind Dey	2 - UW	<small>(A) final</small>						\$226,000	\$216,000
Public Records	Ann Anderson	1 - UW	<small>final</small>						\$1,050,000	\$1,150,000
UWF AiMR	Tim Rhoades	1 - UW							\$107,000	\$403,000
UWT Slate	Mentha Hynes- Wilson	1 - UW	<small>(A) final</small>						\$147,000	\$150,000
Gradescope	Aaron Timss	1 - UW							\$158,000	\$265,000

11 projects

\$171.6M



\$368.5M

Notes:

(A) Congratulations to Clinical Trials, MISM Online Program Management, Public Records, and UW Tacoma Slate for successful completion of their projects!



UW Enterprise IT Projects

Program Operations	Executive Leadership	Major Projects Interdependencies Assessment		<i>Note: ISC and UW-IT resources are tracked within the major projects' budgets</i>
Integrated Service Center	Ann Anderson	UW Enterprise impacts		<p>Overall status: Green-Yellow.</p> <p>The ISC has numerous open projects, and the largest projects at this time are:</p> <ul style="list-style-type: none"> • HB2669 – currently in requirement gathering for implementation in June 2022, • UWFT – FT Program work and updates are captured in the FT Pillar updates. <p>Regarding Issues and Mitigations...</p> <ul style="list-style-type: none"> • Staffing – the ISC is experiencing attrition and the subsequent recruiting and on-boarding that impacts our resourcing. • Prioritization – Our project work continues to be fluid and heavily dependent upon state statutes and regulations. Any new large project work is submitted and reviewed by the Workday Committee for prioritization and, if needed, resourcing and funding.
UW-IT	Aaron Powell	UW Enterprise impacts		<p>Overall rating: Yellow</p> <ul style="list-style-type: none"> • COVID Impacts – UW-IT is closely monitoring operations, as COVID impacts are taking a toll amongst staff. • MyChem – The new application to track the UW's chemical inventory, MyChem, is now live. Roll-out going smoothly. Thanks to EH&S for good collaboration! • Title IX Compliance Reporting – now live. Thanks to the Title IX Office for personalized thank you letters to UW-IT teams! • UW FT – Key decisions remain open across all program areas, at times are made without input from key stakeholders. Enterprise financial reporting starting to make progress thanks to clear charge, clear roles and responsibilities and a new workstream leader. • Adv CRM (UW-IT internal supporting project) – Schedule is in jeopardy due to multiple staff members leaving and challenges in filling and onboarding vacancies. • Staffing Risks – In addition to above, the two major projects, UW FT and Adv CRM, are at risk due to staffing.


* 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

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

-  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 11-17 is Yellow

-  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.
Overall Risk Rating of 18-25 is Red

Wrap Up



QUESTIONS AND DISCUSSION

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