



# Transform IT Steering Committee

November 14, 2018

Presented by: Jessie Minton, Vice Provost for  
Information Services and Chief Information Officer

# Agenda

Charge overview

Report summary

Workshop summary

Recommendation for next steps and timing

# Transform IT Steering Committee

Jessie Minton	VP for Information Services & CIO (chair)
David Conover	VP Research & Innovation
Kyle Henley	VP Communications
Jamie Moffitt	VP Finance and Administration
Brad Shelton	EVP for Academic Operations
Roger Thompson	VP Student Services and Enrollment Management
Angela Wilhelms	University Secretary & Advisor to the President
Adriene Lim	Dean of Libraries
Juan-Carlos Molleda	Dean, School of Journalism & Communication*
Sarah Nutter	Dean, Lundquist College of Business*
Missy Matella	Director, Employee and Labor Relations
Joe Sventek	Department Head, Professor. Department of Computer and Information Science
Ben Brinkley	IT Director CAS IT**
Kyler Nunan	IT student employee**
Dave Gibson	Athletics (IT classified employee)**

*\* These members will rotate with other deans every nine months.*

*\*\* This member will rotate every six months. The IT directors from College of Design, School of Journalism and Communication, and School of Music and Dance are not eligible to serve in IT Director capacity.*

# Transform IT Program Roles

Name	Title	Project Role
Jayanth Banavar	Provost and Senior Vice President	Executive Champion
Jessie Minton	Vice Provost for Information Services and CIO	Executive Sponsor
All of you!	n/a	Program Steering Committee
Gary Sullivan Guy Eckelberger	IT Director, SOJC, Design IT Director, SOMD	Program Management
Varies by service	n/a	Project Team – comprised of service users and service delivery across academic, administration, research units

# Steering Committee Charge

- Align project scope with the requirements of stakeholder groups
- Provide strategic direction to project team
- Recommend approval or denial for scope changes
- Represent stakeholder interests in strategic deliberations
- Provide those directly involved in the project with guidance on business issues, especially issues which might compromise the success of the project
- Ensure effort and expenditure are appropriate to stakeholder expectations
- Assist in the evaluation of project risks, and project risk management approaches
- Reconcile differences in opinion and approach, and resolve disputes arising from them

# What is Transform IT?

Transform IT is the University of Oregon's program that will rationalize the use of information technology resources on campus to better support the University of Oregon's strategic academic and research missions

- Increase the level of IT maturity while creating equity in core IT services provided
- Establish effective organizational structures and governance, and provide transparency for IT investments
- Result in efficiencies and/or savings across the university that can be strategically reinvested in technology

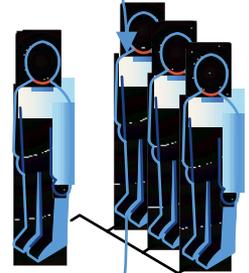
# Project Management Institute Methodology



Development of Shared Structure    Documentation Templates



Hiring of Project Managers  
& Business Analysts



Service Inventory of Campus



# Initiation Phase Progress

Initiate

Development of Shared Structure

Documentation Templates



Hiring of Project Managers  
& Business Analysts

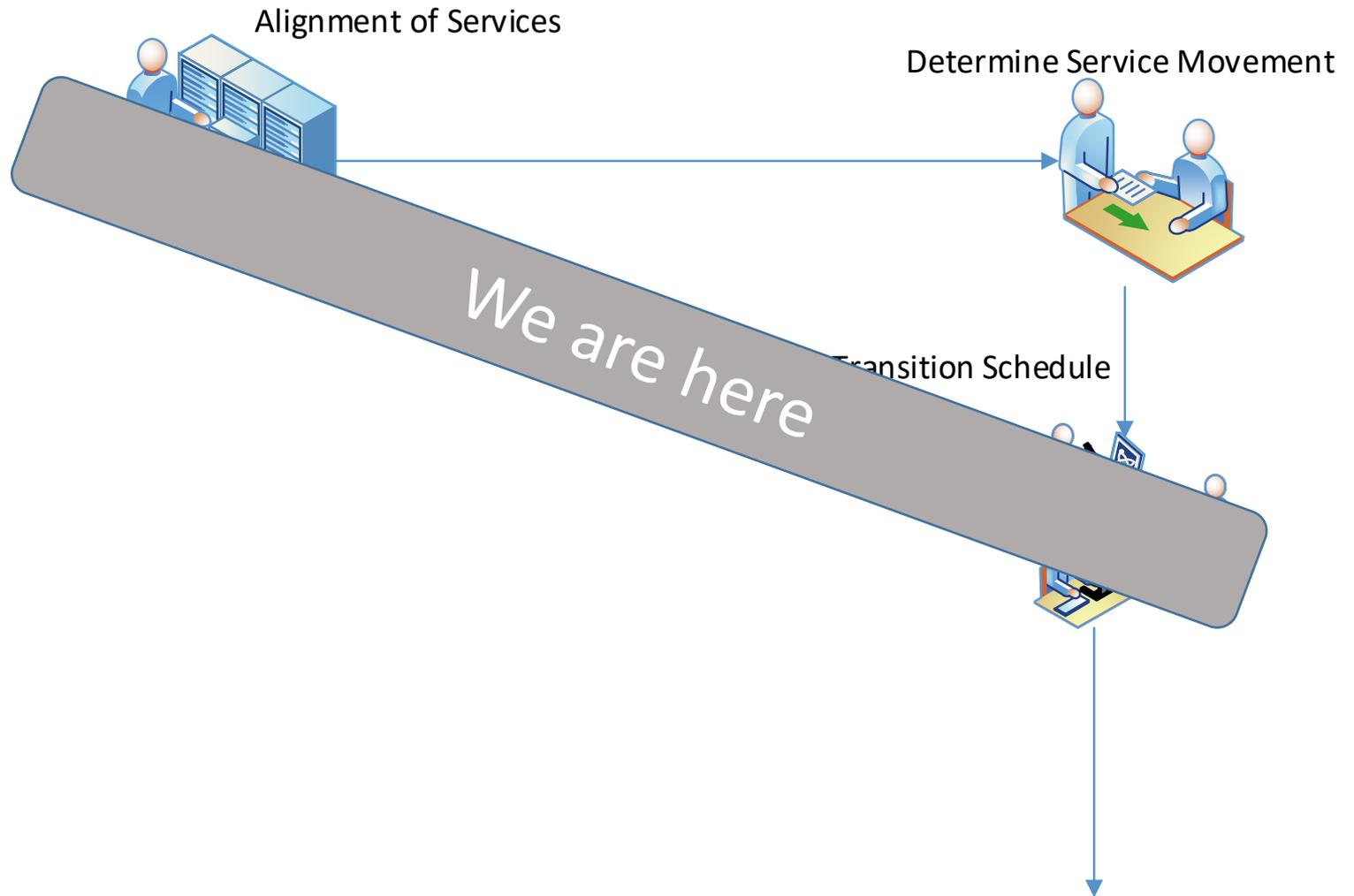


Service Inventory of Campus

Campus  
Engagement  
Project



# Project Management Institute Methodology



# Project Management Institute Methodology



Assessment for Enterprise



Document Workflow & Requirements



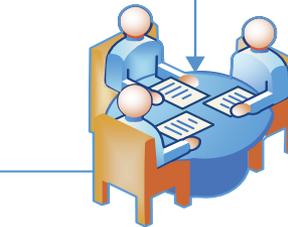
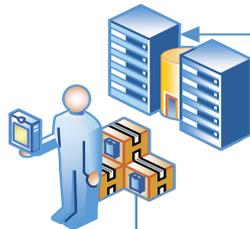
Establish SLA  
Governance & Advisory



Adjustment of Service



Implement Service  
&  
Operational Support



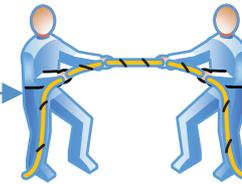
User Feedback

# Project Management Institute Methodology

Close



Post Implementation Feedback



Adjustment for future approach

# Campus Engagement Report

## In scope:

- Deliverables in the scope of the Campus Engagement Report consist of the following:
- Identifying and documenting all UO departments that deliver IT related services
- Identifying and documenting all IT services that are offered by all departments
- Creation of a "service map" that shows the relationship of services offered by the different departments in the UO
- A description of each service offered by each department
- Identify and document the audience for each IT service offered by each department (Faculty, staff, students, researchers, and other)
- Identify the estimated work hours per week devoted to each service
- Identifying and documenting the total IT budget per unit consisting of:
  - FTE Budget (including OPE)
  - Student Employee Budget
  - Operating Budget
- Gather total FTE for each IT unit

# Campus Engagement Report

## Out of scope:

- Identifying and documenting existing IT skills on campus by employee
- Making final determination for how services will be delivered as part of Transform IT
- Recommendations for what departments should or shouldn't deliver services
- Recommendations for staffing assignments and/or the reduction of IT staff on campus.
- Collection of IT unit revenue and cost information
- Non-IT related services

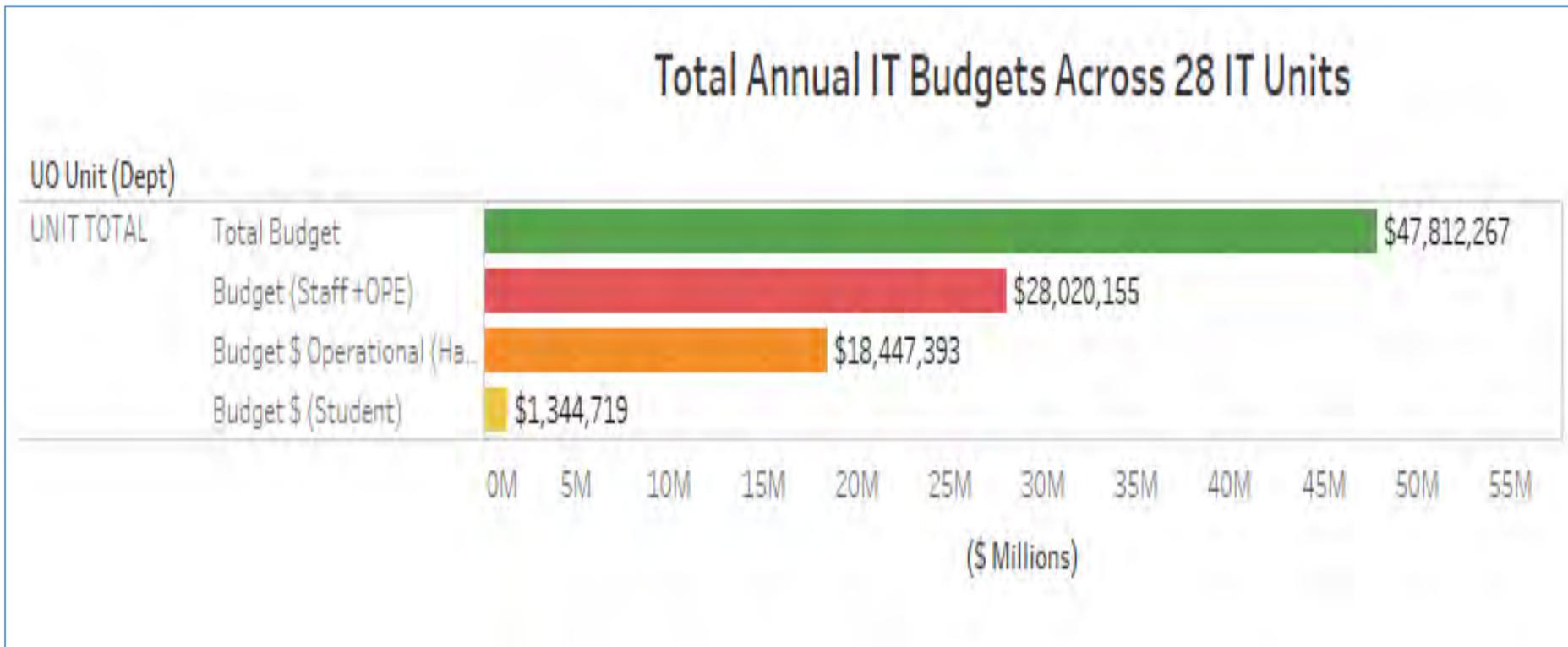
# Campus Engagement Report

28 academic and administrative IT units were asked to provide estimates of their annual IT budgets which included:

Staff (+ OPE) Budget

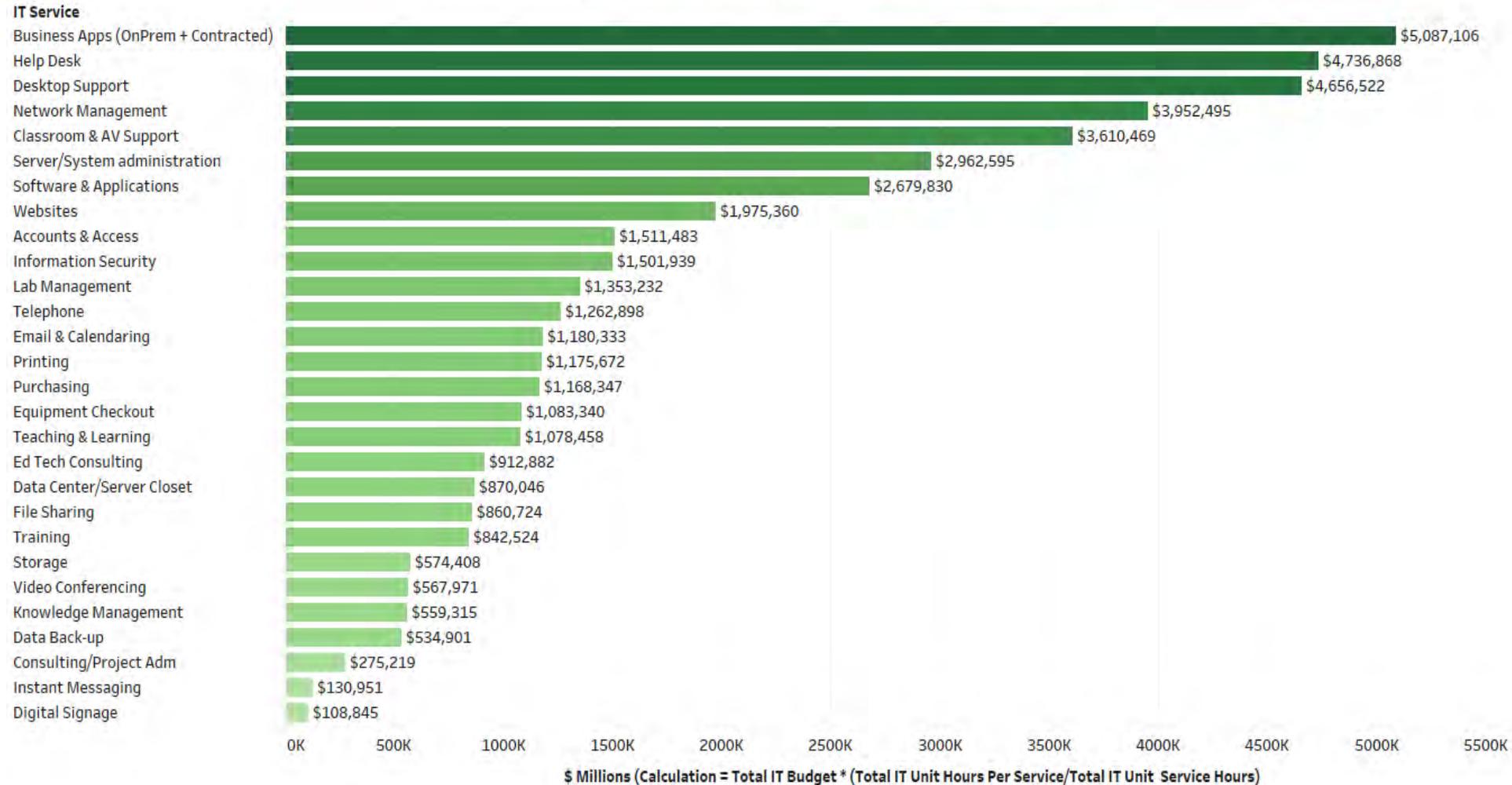
Student Employee Budget

Operational Budget (Hardware and Software)



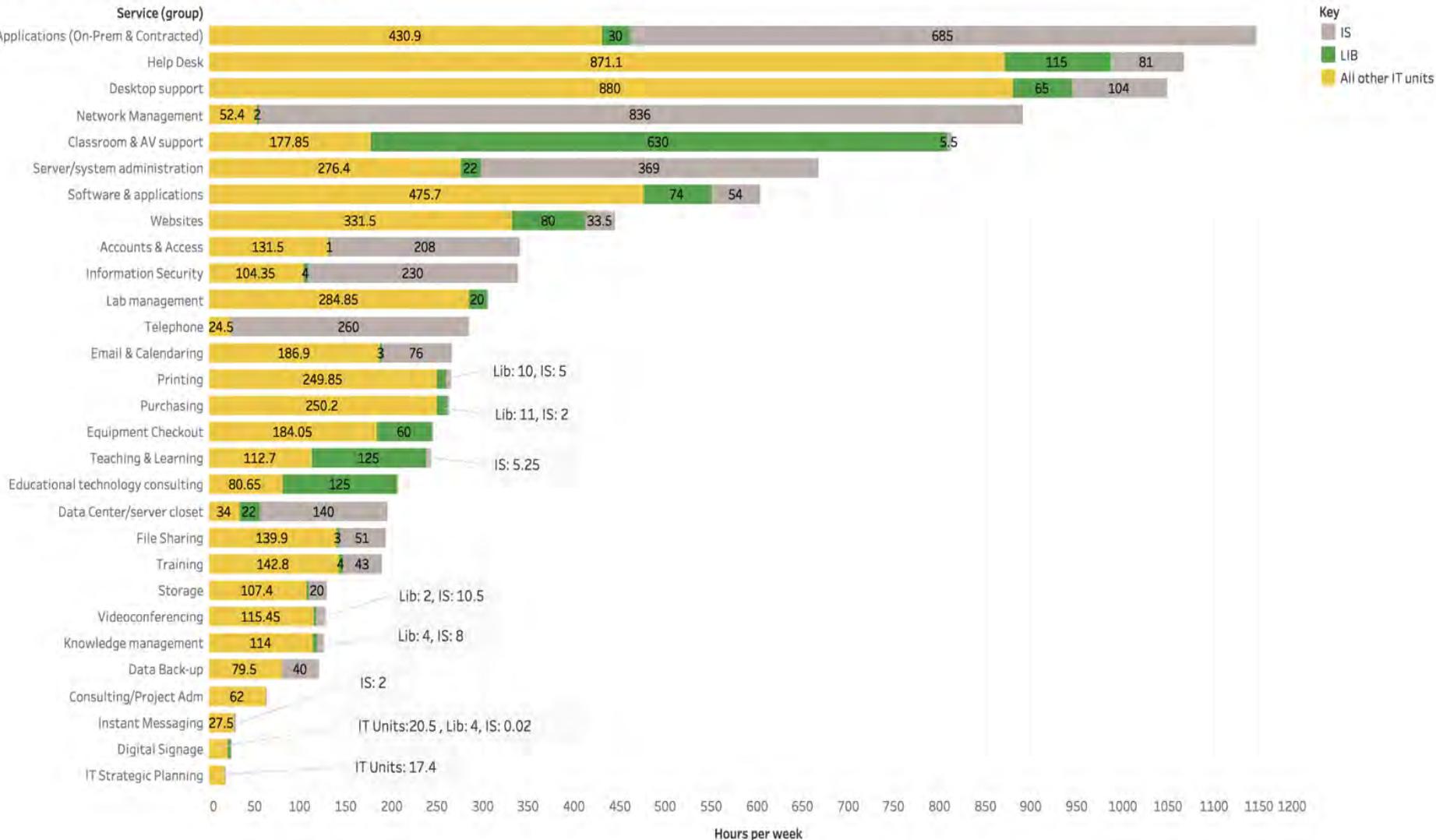
# Campus Engagement Report

Annual Budget Per Service  
 (Based on Total IT Budget 2018 (Staff + Students + Operational))



# Campus Engagement Report

Total staff support hours per week by service



# Campus Engagement Report

Category	Service	ADV	AE/CPE	ATH	BAD	BIO	FASS	CAS	CIS	D'SON	CO'E	SAIT	ECC	ENG	ENBLL	HEALTH	IS	JACUJA	JWJ	LAW	LCB	LIB	PSYCH	SOJC	SO/MD	R&I	TLC	INDU	YLC	TOTAL
Collaboration	File Sharing																												28	
	Video Conferencing																													28
	Email & Calendaring																													28
	Websites																													26
	Instant Messaging																													22
	Digital Signature																													19
	Telephone																													16
IT Service Desk	Printing																													27
	Equipment Checkout																													27
	Desktop Support (Including imaging, etc.)																													25
	Help Desk (Walk-Up)																													20
	Software & App Development																													16
IT Professional Services	Training (Device/User/Software)																													25
	Storage (Faculty & Staff)																													24
	Data Back-up																													24
	Servers (VM)																													23
	System Administration																													22
	Servers (Physical)																													19
	Network Management (Routers/VPN)																													7
Security	Accounts & Access Credentialing Agent																													22
	Security Awareness Training																													22
	Data Security																													18
	Vulnerability Scanning																													12
	Logging/Monitoring																													10
	Firewall - (Non-IS)																													9
Teaching & Learning	AV Support																													25
	Classroom Support (Non-CMET)																													18
	Lab Management																													13
	Educational Technology Consulting																													11
	Teaching & Learning Systems																													10
Administrative	Business Applications																												23	
Other	Contracted Services																												18	
Knowledge Management	Internal Repository																												23	
	External Repository																													18
Purchasing	Purchasing Agent																												23	

IT Service Provided  
IT Service Not provided

# Campus Engagement Report – Research

## Research

Research groups on campus have not been a part of previous IT reports and they were pleased to be considered part of the Transform IT process. The CEP team was able to meet with all of the identified research groups (24 of 24).

The question set used for research units was different than those used for academic and administrative IT units since the scope and nature of IT is different between these groups.

The greatest area of desired interest for the research community:

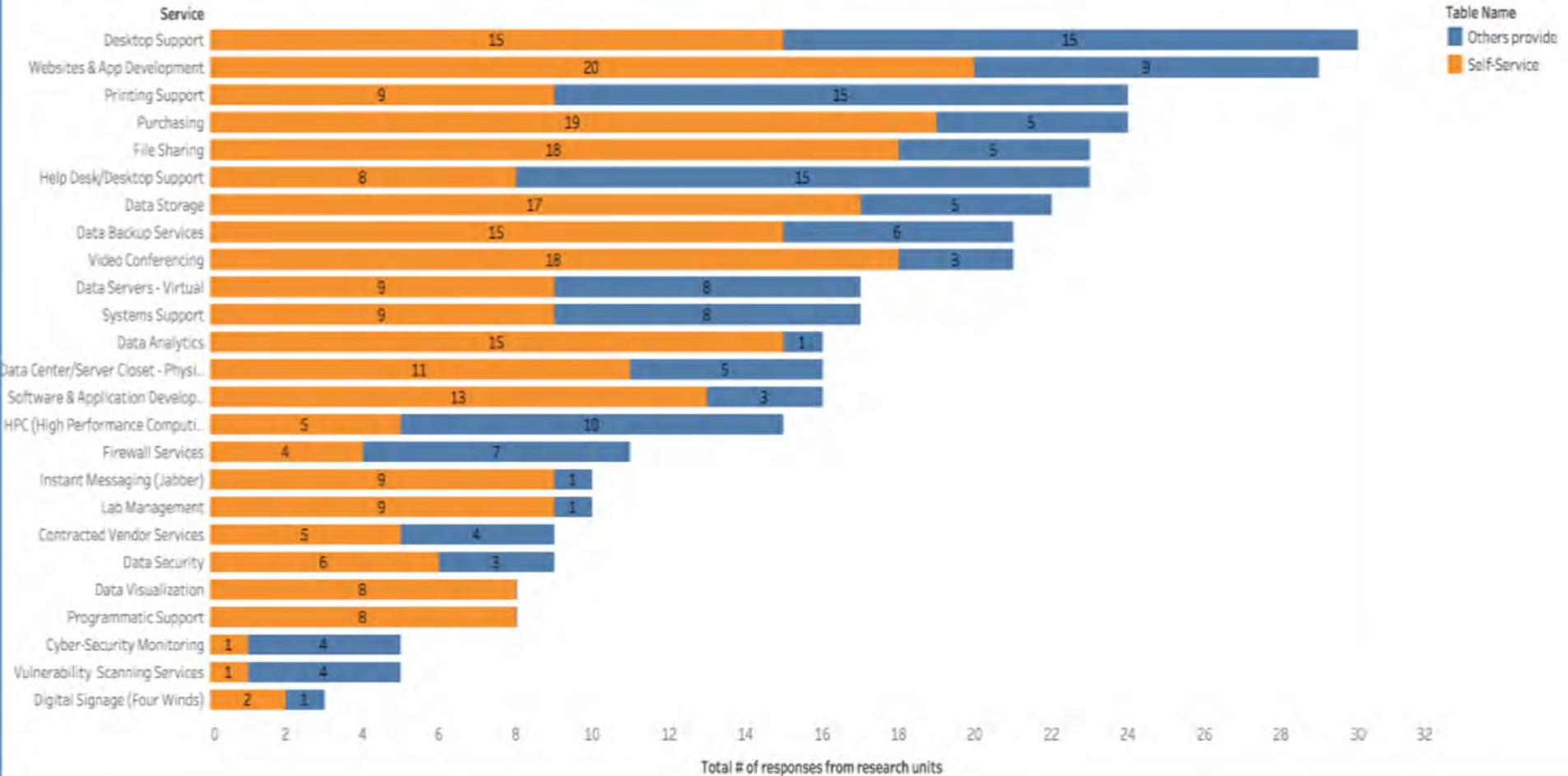
*Programmatic support or consultation*

The next most needed services were:

- Data backup
- Storage solutions
- Website development
- Application development
- Desktop support

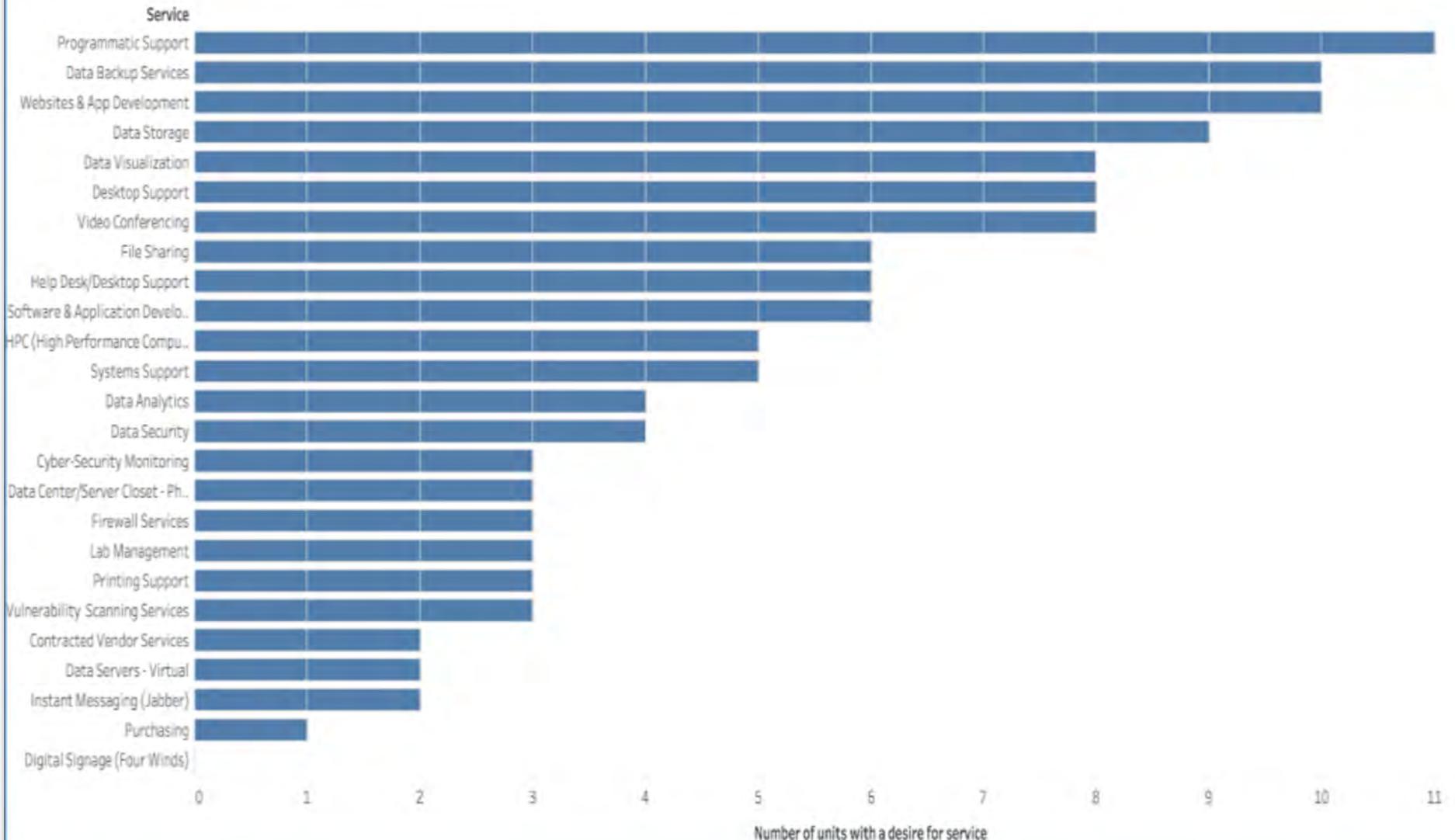
# Campus Engagement Report – Research

Overview of services provided by research units & services provided by someone else



# Campus Engagement Report – Research

## Desired services by research units



# Campus Engagement Report – Workshop Focus

## Focus areas for workshop were chosen because:

- We could not tackle all 30+ services in 2 days
- High volume of resources spent across campus
- Significant level of distribution
- Expressed need for research support

## Workshop focus:

- Help desk/desktop support
- Storage/backup
- Websites
- Business applications

# Workshop Outcomes

## Deliverables from Day 1:

- Creation of values list, incorporating feedback from the day
- Creation of a list of principles for the project, incorporating values

## Deliverables from Day 2:

- Assemble feedback for services (or category) considered
- Create recommendation for services to consider for an enterprise or hybrid model

## November Transform IT Steering Committee Meeting:

- Present recommendation for services to re-envision
- Including proposed order/schedule

# Workshop Outcomes - Values

- We value a positive customer experience and seek to foster services that are responsive, accessible, and enable student, faculty, staff, and researcher success.
- We value a culture that promotes innovation, creativity, and collaboration.
- We value the development and retention of IT staff through training and clear career paths.
- We value our shared charge to promote sustainability, create a secure environment, utilize economies of scale, and efficiently use resources.
- We value customer engagement and building relationships through open communication, transparency, and trust.

# Workshop Outcomes - Principles

## DECISION MAKING

- Decisions will be made based on supporting data and evidence.
- Decisions should take into consideration public perception and university reputation.
- Fairness, inclusivity, and equity will be prioritized in all decision making.
- Decisions will be communicated with the “why” the decision was made.

## GOVERNANCE

- A shared governance model will be used through collaboration and transparency.

# Workshop Outcomes - Principles

## SERVICE DELIVERY

- A common service management framework/lifecycle will be followed.
- Services will be in support of and address business needs.
- Services will be documented and accessible to end users.
- Service design will support and further the university's diversity, equity, and inclusion goals.
- Service changes should yield an improvement in value and/or efficiency while maintaining the integrity of the service.
- Services will be delivered with the necessary resources, training, and documentation.
- Duplication and single points of failure will be reduced.
- Services will be continually reviewed and improved.
- Service and resource gaps will be assessed.
- Legacy services will be retired.

# Workshop Outcomes - Principles

## STAFF

- We will endeavor to match career paths in alignment with staff capabilities and aspirations.
- We will endeavor to increase staff knowledge and competencies through training and professional development.
- We will leverage existing resources and consider promoting from within.

## FUNDING

- A sustainable funding model will be used.
- We will use resources (money and people) efficiently.
- We will be transparent about how cost savings are reinvested.

# Workshop Outcomes - Principles

## CULTURE

- IT values will support the university's values.
- A culture of transparency and open communication will be fostered.
- Cross-campus collaboration will be encouraged and supported.
- Periodic analysis of progress will be done.
- We are committed to adjusting approach based on feedback.
- Staff will be open to change.

## CUSTOMER EXPERIENCE

- All stakeholders will be engaged.
- We are committed to open and improved communications to customers.
- Services will be user-centered.
- We are committed to user-focused processes and service design.

# Workshop Outcomes - Principles

## BEST PRACTICES

- We are committed to following shared standards, (ex: ITSM and PMI)
- Compliance obligations will be met
- We are committed to continuous assessment and iteration through learning from our mistakes

# NEXT STEPS

# Service List

Business Applications	Help Desk	Desktop Support	Network Management	Classroom & AV Support
Server/System Administration	Software & Applications	Websites	Accounts & Access	Information Security
Lab Management	Telephone	Email & Calendaring	Printing	Purchasing
Equipment Checkout	Teaching & Learning	Ed Tech Consulting	Data Center/Server Closet	File Sharing
Training	Storage	Video Conferencing	Knowledge Management	Data Backup
Consult/Project Admin	Instant Messaging	Digital Signage		

# Services recommended out of scope

Business Applications	Help Desk	Desktop Support	<b>Network Management</b>	Classroom & AV Support
Server/System Administration	Software & Applications	Websites	Accounts & Access	<b>Information Security</b>
Lab Management	<b>Telephone</b>	<b>Email &amp; Calendaring</b>	<b>Printing</b>	Purchasing
<b>Equipment Checkout</b>	Teaching & Learning	Ed Tech Consulting	<b>Data Center/Server Closet</b>	File Sharing
Training	Storage	Video Conferencing	Knowledge Management	Data Backup
Consult/Project Admin	Instant Messaging	Digital Signage	<b>IT Strategic Planning</b>	

~~Rationalization not recommended~~

~~In scope for related project~~

# Phase 1 recommendation – in scope

**Business Applications**

**Help Desk**

**Desktop Support**

Network Management

Classroom & AV Support

Server/System Administration

Software & Applications

Websites

**Accounts & Access**

Information Security

**Lab Management**

Telephone

Email & Calendaring

Printing

Purchasing

Equipment Checkout

Teaching & Learning

Ed Tech Consulting

Data Center/Server Closet

File Sharing

Training

**Storage**

Video Conferencing

**Knowledge Management**

**Data Backup**

Consult/Project Admin

Instant Messaging

Digital Signage

IT Strategic Planning

# Next Steps Recommendation

## ***Create campus wide User Support Service (USS):***

### IN SCOPE:

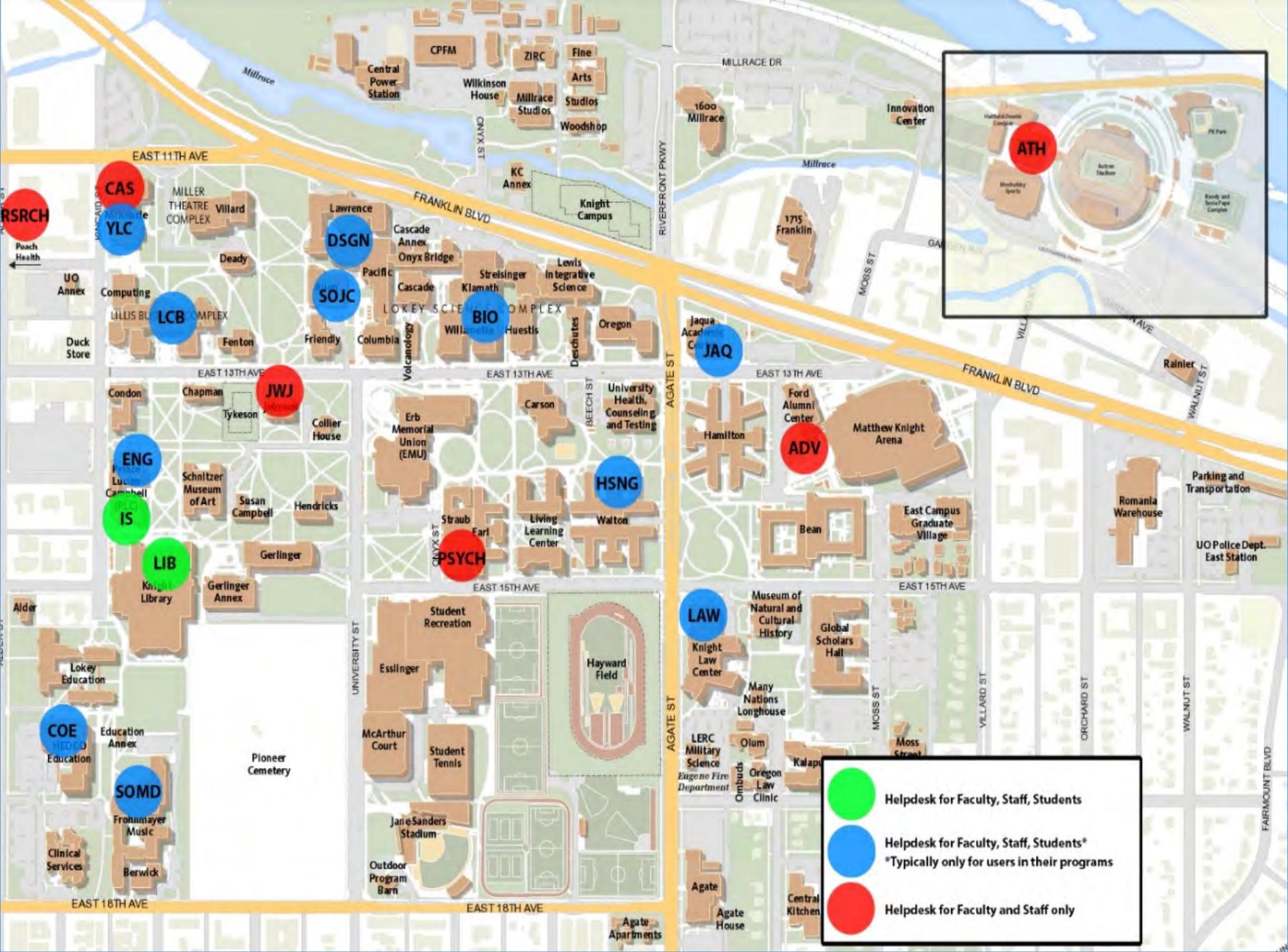
- Help desk, including phone support
- Desktop support
- Lab management
- Knowledge management
- Accounts & access

### TEAM CHARGE:

- Recommend Tier 1 and Tier 2 definitions
- Document service delivery models in all units today
- Recommend single Tier 1 delivery model for campus
- Recommend approach for Tier 2
- Recommend help desk geographical distribution
- Include assumption of extended hours/chat support for online education

### OUT OF SCOPE:

- Organizational structure/staffing changes



- Helpdesk for Faculty, Staff, Students
- Helpdesk for Faculty, Staff, Students\*  
\*Typically only for users in their programs
- Helpdesk for Faculty and Staff only

RSRCH  
Peach Health

CAS  
YLC

LCB

DSGN  
SOJC

BIO

JAQ

JWJ

ENG

IS

LIB

PSYCH

HSNG

ADV

LAW

COE  
MEDIO

SOMD



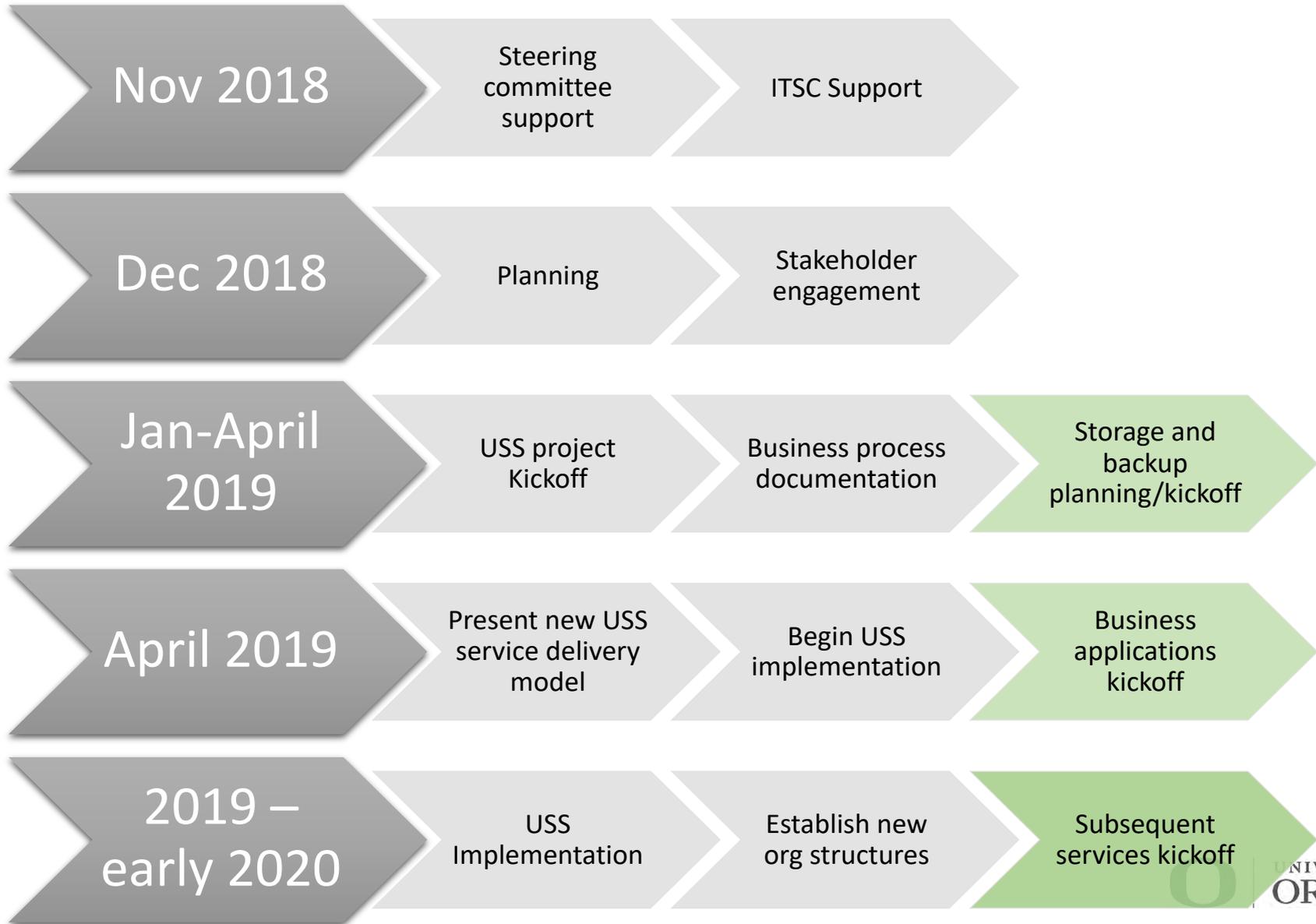
# Next Steps Recommendation

## ***Following User Support Services\*:***

- Storage and Backup
- Server/system administration
- Business Applications
  - Requires dive into each application
  - Determination by application if enterprise or specialized
  - Recommending order of enterprise applications to re-envision
- Scalable research support services

\*services beyond these TBD for sequencing

# Timing for Phase 1



# QUESTIONS?

# APPENDIX

## Foundational IT Maturity

Enabling Education & Student Success

- Online/hybrid education environment
- Emphasize student success in technology choices
- Use tech to meet students where they are

- Transform IT
- IT Strategic Plan “Excellence through Technology”
- Cybersecurity Strategic Plan “SecureU”
- Network redesign
- Project management maturity

Enabling Research

- High speed research connectivity
- Oregon Fiber Partnership – regional high speed connectivity
- Research services
  - Scalable and secure cloud services
  - On-premise services

○ 2019

○ 2020

○ 2021

○ 2022