Today’s Agenda

I. TIER/Shared Services Updates
   ✓ ITS — Steve Fleagle
   ✓ Finance — Debby Zumbach
   ✓ HR — Richard See

II. FY16 Budget — Susan Klatt
TIER Update - ITS

Steve Fleagle

Chief Information Officer (CIO)
ITS
Agenda

- Background and Review
- Updates
  - Chazey Partners Engagement
  - UNI/ISU collaboration
  - TIER IT Implementation Plans
- Q&A
Specific recommendations

- **IT-01**: Centralize commodity and infrastructure services on campus
- **IT-02**: Restructure ITS to accommodate new environment
  - **IT-01 & IT-02** Increase visibility and reporting of IT activities
- **IT-03**: Consolidate applications across campus and between universities
- **IT-04**: Implement virtual desktops, reduce local printers and printing
This proposed plan responds to 4 themes that I've heard or observed indirectly during the TIER project discussions:

- Reduce IT expenses
- Collaborate across universities
- Have one “IT organization” at each university
- We need to make a strong commitment and progress quickly
Our own challenges

We can’t forget about …

- IT security and compliance
- Budget shortfall
- Need to invest in technology for innovation and to advance university initiatives
  - Teaching
  - Research
  - Faculty recruiting and retention
  - Enrollment growth
  - Access to data/information
November
- Board of Regents accepted business cases
- Issued RFP for implementation services
- Invited proposals for self-implementation from the universities

December
- University prepared proposal for self-implementation
- Board received RFP responses from consultants

January
- Board evaluated responses
- Board accepted university proposal, also retained Chazey Partners

February
- “As-is” workshops with Chazey
- One day retreat with IT staff from UI, ISU, and UNI
Scope of engagement is to review and validate our proposal
Total engagement is 12 weeks (started 2/1/2015) for finance, HR, and IT
In IT - focus on end user support
Three workshops
  ▪ “as-is” workshop on 3/2
  ▪ “to-be” workshops on 3/24 and 3/25
Collaboration

- Weekly CIO Council calls
- Joint meeting on 2/18 initial discussions
  - Data center/servers
  - End user support
  - IT Procurement
  - HPC, research support and informatics
  - Enterprise systems, Application Portfolio, Business Intelligence
  - Technology support for classrooms and collaborative spaces
- Groups wrote short reports, published those on OneIT@Iowa website
Guiding principles

- **Overall:** Provide the best solution for the UI given the constraints of the TIER project and the challenges of compliance and budget

- Provide the same or better IT services at lower costs
- Avoid a one-size-fits-all approach to IT
- Set reasonable expectations for savings, schedules, investments
- Garner broad support on campus for the implementation both in advance and during the projects
Based on proposal
16 different areas of opportunity

1. Data Centers/Servers
2. Networking
3. Identity Management
4. Web Site Hosting
5. End user support
6. Application Portfolio Management
7. Business Intelligence
8. IT Governance
9. Technology Support for Spaces
10. Small HPC cluster Administration
11. Central File Service
12. Implement VOIP
13. Office 365
14. Reduce printing expenses
15. IT Procurement
16. HR
Next Steps

- Steering committee kickoff meeting on 3/12
- Complete assignments for leaders and teams
- Sequence projects
- Have teams develop detailed project plans based on project descriptions
- Form advisory groups
- Coordinate campus plan with Chazey engagement
- Coordinate IT with HR, Finance, Procurement and Academic efforts
- Coordinate with ISU and UNI
At the top sits the emission nebula known as Cederblad 214, which is part of a larger star-forming complex called NGC 7822. The dot at bottom is a smaller nebula called Sharpless 170. The entire piece of punctuation spans about 40 light-years in the constellation Cepheus.
1. Realign ITS staff, processes, and service models to be more flexible and better meet campus needs in this new environment
2. Enhance IT governance structure and service level agreements
3. Increase visibility of IT expenses, IT projects, IT staff efforts
4. Adjust reporting relationships to parallel the proposed HR structure
5. Centralize IT infrastructure and commodity services

Addresses all the recommendations & guidance from the BOR through 5 major changes:
Infrastructure & commodity services

Potential services

- Data center
- Servers
- Networking
- Help desk
- Identity management
- Classroom support
- Website hosting
- Desktop support

The change includes …

- Adopting common services, tools and processes
- Transforming the central IT organization
- Freeing up department staff to focus on unique unit IT challenges
- Becoming part of IT organization, having backup and IT peers

It doesn’t include …

- Moving everyone to one place (majority of staff will stay in departments)
- Eliminating collegiate or administrative unit IT groups
- Centralizing everything (only infrastructure & commodity)
- Application administration and development
TIER & Shared Services Update

Finance

Debby Zumbach

Director of Purchasing & Sr Assoc Director of Business Services
Business Services
Sourcing and Procurement

- 7 Categories: Office Supplies, PC’s/Laptops, MRO Supplies, Computer Peripherals, Prime Food Vendor, Janitorial Supplies and Scientific Supplies
- Consultants reviewing spend data from Vendors and contract pricing
- Preparing business case on potential opportunities
- Reviewing Board of Regent Procurement Policies and Procurement Organization
- Office Supply Preliminary Findings
- Next Steps
Tasks Completed:
- Initial Meeting with Chazey
- Issued Survey
- Attended Chazey “As Is” workshop
- Provided complete survey data to Chazey
- Conducted Pilot discussions with Athletics and College of Dentistry due to ERIP opportunities

Next Steps with Chazey:
- Today: Chazey Self Assessment
- March 30th: “To Be” Workshop
- Savings and Plan Validation
Chazey’s Role:

“The basis of our involvement is to validate your plans to move forward, and as part of that we believe that doing the high-level design of what it could look like for UOI is integral to that. It would not be the level such that you could move to the next phase and start to implement. The next phase would be to flush out the finer details through consultation with campus departments and constituents so that you had concrete design elements that you could then build the solution.” Janet Garland, Chazey Partners
Proposed Timeline

Finance Implementation Timeline

<table>
<thead>
<tr>
<th>University-Wide Financial Shared Services Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detailed Design/Change Management</td>
</tr>
<tr>
<td>Infrastructure Building/Test</td>
</tr>
<tr>
<td>Implementation</td>
</tr>
<tr>
<td>Optimization</td>
</tr>
</tbody>
</table>

FY2015: Q2, Q3, Q4
FY2016: Q1, Q2, Q3, Q4
FY2017: Q1, Q2, Q3, Q4
FY2018: Q1, Q2
Design Phase – 6 months

- Initial meetings with Chazey, Budget Officers, Faculty Senate, Staff Council, President’s Cabinet, TIER Leadership, College of Dentistry, Athletics
- Creation of UWSS advisory committee
- Communication Plan
- Survey of staff
- Consultant Verification of Plan
- Analysis of survey and transaction data
- Review data with departments, faculty and staff
- Design and Finalize “To Be” state
What we have not done

- Built a shared services building
- Designed the future state
- Determine which staff should be in shared services
- Determined the funding model
Questions?
TIER Update - HR

Richard See

Manager, UI Business Process Improvement
Human Resources
FY16 Budget

Susan Klatt

Director, Financial Mgmt/Budget & Univ. Secretary
Financial Management & Budget
Thank You