

Rebalancing Technology Committee Report

January 30, 2015

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Section 1: **Membership**

- Beni Asllani, College of Business
- Amy Brock-Hon, College of Arts & Sciences
- Vic Bumphus, College of Arts & Sciences
- Beth Crawford, College of Health, Education, and Professional Studies
- Parthasarati Dileepan, College of Business
- Jennifer Ellis, College of Health, Education, and Professional Studies
- Bryan Ennis, College of Engineering & Computer Science
- Karl Fletcher, College of Engineering & Computer Science
- Tyler Forrest, Business and Financial Affairs
- Yancy Freeman, Enrollment Services
- Amie Haun, College of Business
- Tom Hoover, Information Technology, co-chair
- Tim Johnson, Student Development
- Catherine Kendall, College of Health, Education & Professional Studies
- Theresa Liedtka, Library, co-chair
- Jeffery Wetherill, Center for Academic and Innovative Technology
- Li Yang, College of Engineering & Computer Science

Section 2: **Meeting Information**

- *Minutes and agenda available via BlackBoard*

- Nov. 10 Organizational meeting
- Nov. 17 Review of existing IT Goals to add to, modify, fine-tune goals
- Dec. 1 Review and finalize IT Goals
- Dec. 11 Review of proposed Governance or Organizational Model to add to, modify, fine-tune and agree on model
- Dec. 31 Meet with leadership of Partner/Distributed IT
- Jan. 5 Preliminary discussion of budget related goals
- Jan. 12 Discussion of budget related goals
- Jan. 23 Review of goals with budget; prioritization of all goals
- Jan. 26 Affirm budget-related number, proposed phases of implementation,

Section 3: Summary Report

1. Updated Information Technology Master Plan, with special emphasis on goals related to governance, structure and with budget implications.
2. Met with Partner Information Technology Group to discuss governance and structure and to request submission of current job descriptions and organizational charts for Partner and Central IT staff members for review and to better define Partner IT.
3. Developed Rebalancing Budget Proposal

Section 4: Information Technology Master Plan Goals, Summary

- *Suggested implementation phases*
- *High priority goals*

Phase 1 Goals

- Governance *
- Technology Community Structure *
- Information Technology Budgets and Peer Comparisons *
- Technology Purchasing, Reporting, Intake, and Management
- Student Technology Fee Budgeting Process
- Technology Refresh / Reassessment
- Computer Lab Management
- Accessibility Initiative
- Data Flow

Phase 2 Goals

- Customer Care
- Service Catalog
- Network Access, Architecture, and Storage
- Banner
- Annual Review
- Technology Assessment and Communication
- System Dashboard
- Web Site
- Technology Community Training
- UTC Campus Employee Training

Section 5: Information Technology Master Plan Goals, Details

- *Suggested steps to goal completion*
- *Suggested possible budget Implications*

Establish IT Governance Model

- Suggested steps to completion: a) establish Information Technology Steering Committee, b) establish Technology Review Board, and c) establish Partner IT
- Budget: no budget implications

Technology Organization

- Suggested steps to completion: a) Review information technology related PDQs from Central and Partner IT, b) Evaluate existing organizational structure for inefficiencies and redundant services, c) Define and clarify structure, reporting, and relationships across Partner and Central IT, e) work with HR to develop evaluation criteria to assess technology competence, f) embed criteria into PDQs and include in SPDR process.
- Budget: no immediate budget implications, pending completion of PDQ analysis and structural review.

Information Technology Budgets and Peer Comparisons

- Suggested steps to completion: a) gather holistic UTC information technology spending across all divisions, including all personnel, services, software, and hardware, from all sources, b) analyze data, c) compare spending to peers institutions and ensure apples to apple comparisons, d) make any necessary adjustments.
- Budget: no immediate budget implications, pending result of data gathering and comparisons.

Technology Purchasing, Reporting, Intake, and Management

- Suggested steps to completion: : a) Report IT purchases to CIO via IRIS coding or determine another means, b) Establish thresholds for review of high impact technology, c) Design, implement, and communicate a consistent technology purchase, intake, and inventory process that includes guidance on purchases, a checklist of the documents approval process and a visual model (see p. 73 Appendix 7: suggested Purchase Process Flow)
- Budget: no budget implications

Student Technology Fee Budgeting Process

- Suggested steps to completion: a) review current recurring spending b) develop a proposal, spending, and reporting process for STF, c) consider a possible 10% set aside for one time discretionary spending that impacts students and move personnel to E/G accounts, d) Identify source of inflation funding for items on the STF, e) make sure outcomes are clear, f) ensure student have a role in the distribution of any freed up funds
- Budget: budget implications
 - o Proposal:
 - \$250,000 for innovation grant opportunities and to move one FTE staff member from the STF to an E/G account per year.
 - \$220,000 Debt Fee to remain unallocated until Fall 2015

Technology Reassessment / Refresh

- Suggested steps to completion: a) establish refresh for computers (faculty, staff, labs), network devices, services, other peripherals, b) assess plan and priorities annually (TRM should inform, not dictate, see appendix 6), c) create standard workstations, operating, servers, etc. to simplify troubleshooting, d) establish budget. See pgs. 71-72 Appendix 6: Suggested IT Refresh Standards
- Budget: budget implications
 - o Proposal
 - \$250,000 faculty and staff
 - \$250,000 infrastructure
 - \$500,000 one-time for mission critical needs

Computer Lab Management

- Suggested steps to completion: a) inventory and determine a manageable number of labs, designate them, and consider as part of refresh cycle.
- Budget: no immediate budget implications, but pending review of Computer Lab Report and outcomes, it might have potential saving due to lab closures and/or some costs incurred pending inclusion in Refresh Goal.

Accessible Technology Initiative

- Suggested steps to completion: a) participate in the Accessible Technology Initiative, b) assess current learning environment as it relates to information technology and accessibility, including software, hardware, and current practices, c) make necessary adjustments
- Budget: no immediate budget implications, pending analysis and outcomes.

Data Flow

- Suggested steps to completion: a) examine the current flow of across the University with an eye towards creating more timely, effective, and efficient transfers, including impact on and off-boarding of personnel.
- Budget: no budget implications

Phase 2

Enhance Customer Care

- Suggested steps to completion: : a) create one point of contact, b) establish longer hours, c) makes sure service is accessible and branded, d) consider a shared Service Management System (ticketing system) for Central and Partner IT, e) find permanent home location for the team
- Budget: no immediate budget implications, pending completion of PDQ analysis and structural review.

Information Technology Service Catalog

- Suggested steps to completion: a) create online menu of service options, ideally with links to Service Mgt. System, b) delineate service ownership: Central, Partner, UT, c) include customers served, how to contact, and cost, if applicable, d) group who puts together should include a project team of Central and Partner IT, see p. 64 Appendix 3: Suggested IT Service Model
- Budget: no budget implications

Network Access, Architecture, and Storage

- Suggested steps to completion: a) create a network plan, consider outsourcing and VOIP, include budget. b) review IT Security Plan provides balance of security and patron friendly standards, c) develop campus storage proposal and plan.
- Budget: no immediate budget implications, pending report completion.

Banner, Next Steps

- Suggested steps to completion: a) move from implementation to production, b) establish ongoing role, c) establish ongoing budget, d) discuss intended use of portal versus web site versus Banner and develop a long-term plan.
- Budget: no immediate budget implications, but note it is estimated in 3 to 4 years than an ongoing Banner operating budget will need to establish, at present Banner operations operating off designated one-time funds.

Annual Systems Review

- Suggested steps to completion: a) work with ITSC and TRB to assess and review systems, software, hardware, and more.
- Budget: no immediate budget implications, pending possible changes.

Technology Assessment and Communication

- Suggested steps to completion: a) Review TechQual survey to determine if that can be a starting point for assessment feedback, and/or develop instrument to assess target audience satisfaction, future use, needs, and wants, b) create "single point of feedback" that serves to continually assess services provided and customer satisfaction, c) assign responsibilities among technology community to ensure that all Partner IT have a communication liaison to Central and vice versa, d) design communication program that is considerate of audience needs and desires, e) build a communication scorecard that enables communicators to perform self-assessments, f) establish acceptable vehicle for communicating with IT brand
- Budget: no budget implications

System Dashboard

- Suggested steps to completion: a) establish performance metric that identify minimum downtime for the UTC network and critical systems and services, b) standardize technology communication to be clear and consistent; including if action is required, and c) assess available tools, d) establish schedules conducive to user needs
- Budget: no budget implications

Website Redesign

- Suggested steps to completion: a) focus group and/or survey to determine satisfaction, future use, needs, and wants, b) develop consistent policies for updating content and set expectations for regular updates, c) training for end users and implementers
- Budget: no budget implications

Technology Community Training

- Suggested steps to completion: a) define community of technology workers, b) establish technology training and support group, c) identify training needs, d) outline process by which training funds can be requested and accessed,
- Budget: no immediate budget implications, pending completion of PDQ analysis and structural review.

UTC Employee Training

- Suggested steps to completion: a) identify technology skills per position, include in PDQ, b) based on skills identified build a campus-wide training program, c) develop on-boarding process where employees are trained when employed, d) develop training process for new software, e) develop or adopt training documentation, f) work with HR to implement recurring technology training, g) identify budget, h) partner with UT community to reduce training costs, including online training possibilities.
- Budget: no immediate budget implications, pending completion of PDQ analysis and structural review.

Section 6: Budget Implications

Overall budget implications from IT Master Plan

- Goal with no budget implications: 7
- Goals with potential budget implications 10
- Goals with immediate budget implications 2

Rebalancing budget proposal

- Student Technology Fee Budgeting Process
 - Proposal:
 - \$180,000 for innovation grant opportunities for the campus
 - Remove personnel from the STF equal to \$180,000 and move to E/G funding.
 - \$220,000 Debt Fee to remain unallocated until Fall 2015
- Refresh / Reassessment
 - Proposal
 - \$250,000 faculty and staff
 - \$250,000 infrastructure
 - \$500,000 one-time for mission critical essentials

Total Request: \$1,180,000

Recurring funds: \$680,000

One-time funds: \$500,000

Unallocated: \$220,000