Robin Van Harpen, the Vice Chancellor for Finance & Administrative Affairs at UW-Milwaukee welcomed the CIO Council members.

Planning for April Strategy Session
Sasi Pillay reported that he appreciated the updates he received from each UW System (UWS) institution when he came onboard and is looking for common threads across them. Many institutions have challenges associated with the cost of running administrative systems. Due to heavy burdens and chargebacks the administrative systems significantly impact the ability to do creative things, for example, value-added services for learning systems, identification of at-risk students, etc. There’s more that can be done by working together. The CIO of the State of Wisconsin can be a great partner.

The Council should talk about commodity services in the context of advancing the mission of the University System at the upcoming strategy session at the April IT Management Council (ITMC) meeting. People who work in administrative and academic offices tend to think that their needs are unique despite the push from their IT leaders for commonality. The UWS institutions are also competing for students, which is making it challenging to work together. Pillay would appreciate recommendations for a meeting facilitator who has relevant expertise. Mohamed Elhindi recommended coming to an understanding of the UWS academic initiatives and goals before addressing IT issues. As a starting point, Pillay recommended that the Council members examine the status of their respective institutional strategic plans before the April meeting.

Bruce Maas spoke in favor of a strategic approach. As an industry, higher education is in crisis. Even UW-Madison does not have deep pockets. The UWS needs to be ready or it will be bulldozed. Maas can bring resources to bear in terms of EDUCAUSE expertise, and Internet2 is on today’s agenda, but in the end it’s up to the UWS. There should be no question about the teaching, learning and research missions as
drivers. The UWS historical pattern is for each campus to be an individual snowflake, which doesn’t necessarily add value to those drivers. This is not an IT problem, but the purview of institutional administration and faculty leaders.

Elena Pokot noted that the Common Systems Review Group (CSRG) is also going through growing pains and engaged Don Norris as a facilitator to help clarify its purpose as more than a technology group. In order for the UWS institutions to be strategic, they need to align. These discussions usually end up in the budget realm.

Pillay suggested that budget issues go beyond cost cutting. The UWS has already eked out all the savings and cost-effectiveness it can for now. The UWS needs to change trajectory and add innovation to its portfolios to creatively curb costs.

Rajeev Bukralia explained that UW-Green Bay has just completed a strategic planning exercise and is turning its attention to execution. Resources must be aligned to get the job done.

Chip Eckardt reported that the five northern UWS CIOs meet every Friday and have done a number of things already to help each other. For example, UW-Eau Claire does printing for UW-Stout because they eliminated that operation. Most disaster recovery plans are inadequate which provides the opportunity to come up with one or two solutions that will help everyone.

Bruce Maas highlighted local variability in accepting the need to do things in a common way. Maas has been working with State of Wisconsin CIO David Cagigal for a year and a half. In the past, there have been trust issues between the state and the UWS but today the two entities can’t afford not to work together. If everyone speaks with solidarity, the credibility of the UWS will go up as well. There’s no problem with also considering minority opinions.

Chip Eckardt predicted that some UWS institutions will struggle to work in a strategic, cohesive culture because of trust issues with UW System Administration. Bukralia countered that all of the UWS institutions support the same key goals of student enrollment, student learning, graduation, and nurturing students into fruitful alumni.

In response to a question from Pillay, about one-third of the CIOs indicated that they were involved at the highest level strategic planning processes at their institutions. Some chief business and academic officers feel their institutions need to be unique. Because of the declines in enrollment we are competing for the same students which makes it more challenging to work together.

Pillay noted that there is variability in the state of strategic planning at the UWS institutions. He encouraged the Council members to investigate the status of their institution’s strategic plan. CIOs should not be order-takers or providers, but rather work strategically with their institutions to deliver shared objectives.

Maas reiterated that teaching/learning and research missions are at the core of the UWS. However, in some ways the institutions view themselves as snowflakes regarding the HR System (HRS) and the student information systems. At present, IT may be adding little value to the teaching and learning mission but the CIOs are not the problem. These endeavors are controlled by their business owners and they have to be part of the conversation. In the beginning, there were lofty goals for HRS until political pressure brought to bear by faculty and administrations led to a multiplicity of payroll calendars, payment systems, and disparate solutions.
Pillay asked the CIOs if they were comfortable pushing back against needless customizations. The Council members are comfortable raising the issues, but judge that they usually make little difference to provosts and chancellors in the face of shared governance. Arguments based upon data don’t always hold sway, especially after people have seen a large investment made and expect that it should be giving them what they want. David Stack recalled the maxim, “Don’t bring data to a knife fight.” from the EDUCAUSE Connect event in Chicago.

Bukralia stressed the broader context of heightened competition across higher education in general and the UWS institutions in particular. Within Wisconsin there are more than 26 UWS institutions, private colleges, and for-profit colleges all competing for the same students. It’s best for IT to have a role in student learning without spending too much time and money on things that don’t support this mission. Provosts have unrealistic goals that they expect IT to fulfill. It’s impossible to break loose if every institution wants to be unique and IT has to support their uniqueness.

Pillay concurred that he has heard complaints about spending on administrative solutions that make up approximately two-thirds of the Common Systems budget. Bukralia underlined that these systems provide no competitive advantage, they’re commodities. Every institution already has a Learning Management System and they don’t provide competitive value. The focus should be on customizing the learning experience.

Pillay noted that currently all the UWS common systems are disparate. There is no obvious overarching architecture. Unless we work together as a group, there will be data ownership issues. Some people want to retain turf by protecting data, but the success of data mining comes from putting it all on the table. We are all overburdened with data that makes no sense.

Maas reported that Oracle just announced a new cloud-based student information system as an alternative to the old model of locally implementing a base system and customizing it. For the first time, it’s possible to think about retiring all of the snowflake student information systems at each of the UWS institutions that collectively cost hundreds of millions of dollars.

Pillay has already met with Senior Vice President Mark Nook because IT needs his help in intersecting with academics. However, IT also needs to help shape the dialogue. Chrysler didn’t design the minivan because customers asked for it. They worked with the industry to provide a product they could sell. IT needs to find those opportunities. Pillay recommended creating a draft document to share with Nook and other stakeholders because it’s easier to get people to comment on something that has already been developed. Our job is to increase awareness because people haven’t made the connection that being different is also expensive.

Lori Docken recommended creating fertile ground ahead of time and building upon the work that Don Norris has already done with the CSRG to reframe the role of the common systems. Norris is focused on teaching and learning and he’s familiar with UWS politics.

Pillay reported that he attended the CSRG meeting briefly and heard conversation to the effect that the budget was too large. People expressed their preferences for using their own, cheaper systems.

Maas expressed concern about tying the budget to historical levels rather than looking at the needs of the UWS. The common systems budget should not include business operations of which IT is just one component, i.e. the Human Resources System.
Pillay recommended two different types of common systems meetings: one for strategy and another to talk about rate structures and charge-back services. Docken concurred that the CSRG has a tendency to become consumed by the budget and not have time to discuss strategy.

Pillay recommended that Council members make it a priority to attend future strategic planning sessions in person to improve the discussion. Suggestions for specific questions that need be addressed next month should be sent to Pillay and Docken. A CIO Council breakout room will be arranged during the April ITMC conference.

In preparation, Maas encourage everyone to read the EDUCAUSE Review paper by Brad Wheeler “Speeding up on Curves.” (http://www.educause.edu/ero/article/speeding-curves) Maas is working with Wheeler and eight other universities to design a national infrastructure design for teaching and learning that goes beyond course management to include analytics and repositories.

**Network Updates**

Bruce Maas reported that Shannon Larson and Lorie Docken met with the network migration teams from both UWS and WiscNet yesterday. UWS President Cross also met yesterday with the Wisconsin State Telecommunications Association to talk about the new UWS network. The telecom industry’s view of the UWS as a competitor is subsiding and there is more interest in collaborating with the UWS despite the state legislation that impedes it.

Elena Pokot noted that that the Wisconsin Department of Administration has signed a contract with WiscNet. Maas is unaware of the state is intending to do. He does not foresee the UWS entering in to any agreements with WiscNet, especially during the transition.

Shannon Larson reported that the master schedule of when each UWS institution will be on the new network is still under development. The dates will be moving targets because of weather factors. Cutovers will probably be during late summer and fall.

**Tech Tuesdays**

Chip Eckardt is willing to organize additional Tech Tuesday webinars if there is sufficient interest. The consensus was to ask vendors to discuss their roadmaps.

**FLEX at UWM**

Laura Pedrick explained that the UWS Flexible Degree Option (FLEX) is based upon students demonstrating the competencies that they have. UWM currently has four programs, two of which - a BS in Nursing and a Diagnostic Imaging program - are aimed at practicing professionals.

FLEX has 12 starting times per year, known as subscription periods. This process has called for creative problem solving from each participating institution because higher education systems and workflows are semester based. Students work at their own pace to pass assessments under the guidance of faculty and advisors, who are known as academic success coaches (ASCs), on individualized learning plans. Competency sets, which are the equivalent of courses, are built with the D2L learning management system. Marketing and admissions are handled exclusively by UW Extension.

All competency set are structured according to a common template in D2L that includes:

- overview
- learning resources
- practice assessments
- assessments
Each competency set is built to match an equivalent traditional course to maximize existing transfer agreements. Even though the competency sets were repurposed from existing online courses, it was still necessary to adapt them to the self-pacing and freedom of the FLEX program.

UW-Madison is offering non-credit courses through FLEX. UW-Parkside and UW-Stevens Point are also coming onboard. The New York Times says that UW FLEX is perhaps the most watched competency-based experiment in the nation. The UWS received a $1.2M grant from the Lumina foundation to develop a competency-based toolkit for other institutions to use.

UWM has its own instance of D2L that is being restructured to accommodate the 12 subscription periods per year. Exam proctors are employed because assessments are infrequent and the stakes are high. The UWM Libraries has been developing guides that are specific to each competency set.

In terms of tuition, FLEX is the least expensive option followed by face-to-face courses and then online courses. There are tuition rates for a single competency set as well as for an all-you-can-learn plan.

The UW Colleges is offering an associates degree in FLEX that can provide the basic undergraduate curriculum for those who need it. Potential students go through a two-step FLEX Fit program to assess if they are the type of learner who is likely to succeed in this format. Some students are doing great, others will be counseled to move to another learning format.

Most students have enrolled in FLEX with many credits already completed. A new progress grade, PR, acknowledges that a FLEX student may not have completed all of the assessments in the competency set before they ran out of time. UWM allows for two retakes of courses.

Pedrick explained that it is a huge effort to rethink everything about a course, which is both fun and terrifying. Support has come from a combination of the campus departmental resources, the UWM Learning Technology Center (LTC), and the Continuing Education, Outreach and E-learning (CEOEL) division of UW Extension. The LTC helps with the D2L issues.

Beth Schaefer reported that the UWM Help Desk has not been augmented although there are discussions about how to categorize incidents associated with FLEX. FLEX students need to be identified in the data feeds flowing into UWM’s new Cherwell service management system and the corresponding workflows need to be followed. This work is being undertaken in concert with the UW Flex Tech Team.

The Academic Success Coachers typically have years of experience in advising. It is important that FLEX does not turn into dozens of separate independent studies for the faculty members.

Ed Melchior explained that UWM has undertaken 34 PeopleSoft Student Information System projects to accommodate FLEX that have required about 250 hours of development work plus another 100 hours of engagement with a financial aid consultant. It took considerable time to verify that the integrations were working with D2L, library resources, the National Student Clearinghouse, the Central Data Request process, the transcript process, the automated letters created within PeopleSoft, and the modification of high school units to milestones. A new career was created within PeopleSoft for FLEX. Once the UWS acquires a new Customer Relationship Management (CRM) system, a similar amount of work will have to be repeated.
Pedrick reported that Intigen and SalesForce have been awarded the CRM contract. A Request for Proposals (RFP) for a competency-based Student Information System was not awarded. Meanwhile, PeopleSoft has announced their student cloud system and hinted that it may accommodate competency-based education.

Federal funding for financial aid has not yet been secured because the aid model is based upon a traditional understanding of the credit hour. For the time being, UW Extension is providing Pell Grant support.

Bruce Maas thinks that the CIOs and Provosts can collaborate together on the changing landscape for teaching and learning. The different PeopleSoft Student Information Systems at the UWS institutions are an impediment to going forward.

Sasi Pillay recommended that the UWS institutions learn from each other so that the next FLEX implementation can take less than the hundreds of hours that UWM has invested. It is important that students not have multiple sets of electronic identities from the different institutions. Pedrick reported that UW Extension is leading the system-wide teams that are sharing expertise. The specific implementations at each institution are likely to be different.

**Internet2 Membership and NET+ Services**

Shelton Waggener, Senior Vice President NET+ Services for Internet2, explained that most costs have already been driven out of education except labor, which will always continue to go up. Tuition is the number one source of revenue. Federal grants and philanthropy are tied for number two and state support is number four.

Implementing IT at scale in the cloud still allows for customization within each institution’s “condominium.” Custom and cloud environments can co-exist during the transition period from the former to the latter. Net+ is based upon the NIST model of federated cloud computing services with the addition of identity management. The Internet2 community of 250 institutions has 10M constituents and can operate at a very efficient scale rather than merely buying in bulk and attempting to “squeeze” the vendors. For example, ninety-seven percent of the monies paid to Oracle go to their sales cycle, not the actual product. Collectively, higher education should try to save that 97%.

All Net+ services have to scale at least nationally and be delivered over the network. The services are categorized within five domains:
- Trust and identity
- Infrastructure and platform
- Software as a Service
- Voice, video and collaborations
- Digital content for research and education

Any school that is an Internet2 member can sponsor a new service. Then eight or ten schools participate in a service validation process as early adopters. From there, a service can move to general availability followed by a process for ultimately leaving the Net+ portfolio.

The products available through Net+ are customized for higher education and are not the same versions as are being sold directly by the vendors. There are 57 products altogether across the five domains going through the process. Office 365 goes live this week with enhanced service terms and a Net+ Community Cloudvantage escalation channel that is shared across multiple schools that might be reporting the same issue, e.g., the brown-outs that have been seen at USC and other institutions. This additional support is
included for Internet2 members as part of their Office 365 subscription. Office 365 has announced support for SAML 2.0 that was the result of 19 months of work on the part of Internet2.

Internet2 has been working with Kaltura to try to put rebates in place as additional campuses come in under the same agreement. The Smithsonian is a Net+ member and will be creating a digital version of millions of objects for member institutions from the K12 level on up. Desire2Learn will go live in three weeks.

The Internet2 administration has not selected any of the services in the portfolio. The services have all been sponsored by member institutions. It is possible to have competitors within the Internet2 portfolio so long as they all abide by the terms and don’t overwhelm the service domain. That is why it is important to have a process for sun setting services. The overall model is one of constrained choice. During the sunset phase no new subscriptions to a service are accepted and the provider operates for an additional 12 months while the participating schools work on getting their data out or setting up individual contracts with the provider.

There are three possible timelines for bringing a new service into the Net+ portfolio:
- 45 days if the provider certifies that they have met all of the Internet2 requirements and are already in production
- 90 days if some tuning is needed
- 180 days if the process is started from scratch

If all of the campuses in the service validation phase don’t sign off, these processes can take longer. Five services were eliminated from the Net+ program by the participating campuses for various reasons.

There is a qualified entity list of Net+ services that are open to Internet2 members as well as a limited number of additional participants. For example, WiscNet can deploy Net+ services to non-Internet2 schools such as K12s.

New versions of the Box.Net offering will be announced in a couple weeks, including a base version and a Business Associates Agreement (BAA) version for the healthcare market that addresses HIPAA compliance.

**UW Disaster Recovery & Data Center Survey**

Nick Clesinski explained that the impetus for the disaster recovery and data center survey came from a group that began discussing the services that used to be provided by WiscNet with an additional focus on data center backup resources.

Almost all of the UWS institutions have data centers, many with extra space power and cooling, that are connected by a statewide network.

The survey will discover current institutional capabilities as well as the requirements for secondary locations in terms of power, space and services. The survey will be opened this week and remain open for three weeks. There may be an opportunity at the April ITMC meeting to share preliminary results and look at the next steps.

The collected data will enable an analysis of the various data center levels across the UWS institutions. Meanwhile, UW-Madison is participating in an RFP for Level 1, 2 and 3 data centers. Bruce Maas will send a link to the results from their on-campus investigations. Steve Krogull will address a future CIO
Council meeting based upon what they have learned about different categories of users. For example, researchers don’t want facilities that are over designed.

Maas has been working with an outfit in Madison that is interested in offering a cloud service data recovery service.

**UW Technology and Information Security Council Update**

Chris Liechty reported that the TISC group is preparing for the security breakout session at the April ITMC conference. The goal is to review the overall security framework for the UWS, of which the previously developed baseline recommendations comprise a portion. They are also working on renewal of the Identity Finder contract.

The implementation of the one-time password project for HRS went well. The core users of the Shared Financial System (SFS) are the next group that will need to adopt this form of multi-factor authentication. The service owner is UW Digital ID and Chris Spensor is the interim leader. The estimated completion date is June 30th.

There are not recommendations for specific computers to use with the multi-factor authentication process because the device configuration may be determined by the application, e.g., HRS or SFS. The UW Digital ID is trying to develop a security best practice around the distribution of one-time password fobs and connecting other applications to multi-factor authentication. There is not a policy that says people need to use university-owned computers to access these systems although the owners of the applications are free to make such a stipulation. Less than 1% of the logins are from people using temporary tokens because they have forgotten or lost their fobs.

Sasi Pillay would like to see recommendations for policies and procedures for best practices coming from TISC, not the application owners. A risk-based portfolio would allow senior decision makers to either accept the risks or invest in the compensating controls. Liechty explained that the security baseline document is a guideline that makes recommendations for servers, workstations and physical security. Ilya Yakolev recalled the value of the system level policies that existed in MNSCU when he worked there.

**Procurement Update**

Ruth Ginzberg reported that Oracle has decided not to pursue their re-interpretation of certain terms in the contract. Elena Pokot distributed Oracle’s announcements from the Higher Education User Group (HEUG) conference that include a Campus Solutions upgrade to version 9.2.

The proposal that the UWS has received from Turnitin does not yet represent serious negotiations. Bruce Maas recommended asking Internet2 if the product on their Net+ roadmap. The D2L contract states that upgrades cannot break integration with Turnitin. An entire institution has to license Turnitin for it to be integrated with D2L for that institution.

The Microsoft Office 365 contract is being reviewed by Legal Counsel and they have raised several concerns pertaining to data retention and disposal. The contract language is not consistent with state requirements. In addition to the base contract, participating UWS institutions need another measure in place for records retention, litigation holds, etc., either as an extra Microsoft service or a local implementation. Several members of the Council objected and stated that UWS employees are responsible for their own records retention.

Another concern on the part of Legal Counsel is that the institution will not be notified of any unsuccessful security incidents. Cloud contracts should have some kind of a threshold for which types of
security incidents require disclosure to their customers. It is important to have contact information on file with Microsoft to receive this type of information.

People who are interested in using MHEC contracts should sign up on their email distribution list. Because MHEC is a compact and not a purchasing consortium, they can be used directly by citing chapter 39 of the state statutes. Chris Liechty is on a MHEC committee that is looking into cyber liability insurance.

Marsha Henfer and Sasi Pillay offered their thanks and congratulations to Lorie Docken as the new Associate Director for Strategic Initiatives at the UW Service Center.

**Upcoming Meetings:**
- April 29th – CIO In-person Meeting at the ITMC Conference
- May 15th – CIO In-person Meeting – Madison
- June 19th – CIO In-person Meeting – Madison

Meeting dates, Directory of UW CIOs, Meeting Summaries:  
[http://www.uwsa.edu/olit/cio/](http://www.uwsa.edu/olit/cio/)