

UW System CIO Council

Date: February 19, 2015	<p>CIOs: Bob Beck, Chip Eckardt, Werner Gade, Bruce Mass, Anne Milkovich, Sasi Pillay, David Stack (reporting), Suzanne Traxler, Ilya Yakovlev, Doug Wahl, and by teleconference: Jim Barrett, David Kieper, Joe Kmiech, Elena Pokot, Stephen Reed</p> <p>Guests: Kelli Crane, Alex Deschenes, Jason Fishbain, Ruth Ginzberg, Steve Hahn, Tom Jordan, Ty Letto, Kathy Luker, Kevin Murphy, Dave Pulda, Terry-Lynn Thayer, Michael Schlicht, Bob Turner, Olga Turkina</p>
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Preparing Your Campus to Compete in a Digital Education Ecosystem

Sasi Pillay introduced Terry-Lynn Thayer from the Gartner corporation who lead a discussion on technology trends in higher education. Thayer explained that Mark Cuban from Shark Tank thinks higher education is going out of business and he is supporting four companies that are re-inventing higher education in the areas of:

- re-inventing credits
- re-thinking business models
- competition for students
- student success

Thayer pointed out that our ERP systems do not provide the same positive user experience as current e-commerce and social media systems. They are also too inflexible to support new business models such as competency-based education.

We are moving past the era of single vendor ERP suites that were promised to provide a “single view” of a student. They did accomplish a measure of IT industrialization.

The Nexus of Forces (information, mobility, cloud, social media) have all put pressure on ERP systems. Typically transactional users are the ones who are most happy with current ERP systems. Faculty, staff and students are far less sanguine.

Gartner's HOOF Model

<p>Outsource Everything In 5-10 years the purchasing of everything will be from BPO providers in the cloud, not the ERP vendors directly.</p>	<p>Flip In 5-15 years or longer ERP functionality will be completely in the cloud</p>
<p>On-Premise Monolith The dominant model today is ERP mega suites with tactical point solutions and simple extensions to social and mobile applications.</p>	<p>Hybrid Reality Will be evolving over the next 5 years with reduced on-premise ERP systems in addition to some cloud add-ons.</p>

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Higher education is in the process of moving from the bottom left to the bottom right quadrant in the HOOF model.

Bruce Maas questioned whether there was bold leadership to invest today to make transformational change over a couple years to potentially cheaper models in the midst of the current fiscal situation. Sasi Pillay also noted the need for the time to make changes regardless of how much money is available. He explained that David Miller would like to use whatever reserves exist at the UW System level to make new investments, not mitigate cuts at the campus level.

UW-Madison has deployed shared four-tiers of storage and a virtualization system that has investments from campus administration to match Best Buy prices. Because campus money is invested, UW-Madison can't offer the same rates to the other UW System institutions. Pillay noted that this type of model was used to stand up the new UW SysNet and various services at ICS, such as videoconferencing. Earlier in her career, Thayer used this model for high performance computing. The challenge is sustaining these models.

Pillay reported that President Cross is not enthusiastic about investing in more infrastructure. Thayer noted that future models will have higher operational expenses, which is what will likely be cut in current fiscal environment. The cloud providers are getting very aggressive on price.

Because of the agile flexibility in the cloud, it may make more sense to outsource new, competitive endeavors rather than commodity services.

Chip Eckardt noted the amount of work involved in pulling data together from different systems. Thayer agreed and described the evolution of the ERP philosophy from "best of breed" to "mega suites" to a post modern, disaggregated environment. Mass stressed the need for adoption of the IMS standards to aid integration. Elena Pokot pointed out the cultural changes that needed to bridge the silos that exist at the UWS institutions between different business offices.

Thayer predicted that whereas we used to integrate *internally* at our institutions and we will need to integrate *externally* with the vendor community. Kelli Crane noted that this model will require new skill sets.

Gartner has proposed the formation of bi-modal IT organizations that are a pairing of both stable and agile systems.

John Krogman stressed that draconian cuts in the UWS Common Systems budget will stifle the capacity for innovation. The risks need to be made clear to the Commons Systems Review Group (CSRG) Budget Committee. Pillay recommended that the CIOs spend some face time with their senior leadership. Pokot highlighted the shortcomings of considering the common system

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proposals in isolation from each other. Pillay noted the lack of documentation for Common Systems.

Thayer challenged the Council to not focus on the potential cuts but instead to look toward changing the underlying business models. One possibility would be to move towards subscription systems that can be scaled according to business outcomes and usage rather than a large up-front cost followed by fixed license fees.

Thayer explained that legacy vendors have a lot riding on selling on-premise software and most are reticent to see that go away.

Pokot suggested moving an already centralized system to the cloud, such as HRS, rather than decentralized systems such as the Student Information Systems. Pillay recommended deploying new systems in the cloud, such as recruitment and retention. Another possibility would be the UWS Budget System, which Krogman explained is a mainframe system and not conducive to re-hosting on the cloud without millions of dollars of investment in moving to a new product.

Thayer noted more than a dozen functions that typically exist in student information systems that could be split out into different products, e.g., admissions handled by a CRM system.

Gartner describes a three-layer architecture for ERP systems:

1. systems of record
2. systems of differentiation
3. systems of innovation

The pace of change is necessarily slowest at level 1 and quickest at level 3. It can be a mistake to try and drive innovation at level 2.

Gartner has 8 building blocks for the CRM framework:

1. vision
2. strategy
3. customer experience
4. organizational collaboration
5. processes
6. information and insight
7. technology
8. metrics

Note that technology is only one of the building blocks in the above stack, and it is not the fundamental block. Thayer noted the importance of focusing on the customer experience, not merely automating the back office processes. There are many different CRM products at different maturity levels and architectures. Gartner has provided a CRM Maturity Model.

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Gartner Service Offerings

Brian Murphy has taken over from Steve King as the Gartner representative for Wisconsin. Gartner is adding a workgroup option to their Executive Programs model that could apply to the UW System. There is also promotional pricing through Q4 2015. Murphy noted that use of Executive Program resources tends to go up during difficult financial times.

with the UW System. Pricing information will be emailed to the CIOs.

Sasi Pillay explained that he will be engaging Gartner to look at procurement processes and contracts for:

- Business Intelligence
- Student Information Systems
- Telephone replacement

CIOs at the UWS institutions could be added to the UW System Administration contract at either of two levels:

- Advisor, which includes unlimited calls with Gartner analysts as well as other services and benefits
- Crossover, which requires analyst conversations to be coordinated through Pillay

David Stack suggested another model might be for someone in the UWS OLIT office to be a point person for all of the other UWS institutions who would contribute to that person's salary.

The Gartner education team has four analysts, including Terry-Lynn Thayer and Glenda Morgan who used to be

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Agenda Item	Discussion	Action / Conclusion / Rationale	Responsible Parties
CSRG Budget Committee	<p>Sasi Pillay reviewed the draft CSRG budget committee recommendations. The general guidelines, given the current fiscal climate, included:</p> <ul style="list-style-type: none"> - No new initiatives, upgrades or improvements in service - Spare small budget services - Spare academic systems from cuts - Use FY14 balances/residuals to buy down FY16 costs <p>The outcome of the recommendations is proposed reductions of \$3.5M from the original submissions for FY16 that would hold campus assessments almost constant. There might also be residuals from FY15 balances/residuals that could be applied to the FY16 assessments.</p> <p>The project sponsors have been asked to model additional reductions and to report on the potential collateral impacts to other services.</p> <p>Chip Eckardt highlighted the pent up demand for analytics from D2L. Bruce Maas concurred that the project has been largely fruitless to date because of the difficulty of the underlying software stack, which is why Maas is promoting a future vision through Unizin. Suzanne Traxler expressed concern</p>	<ol style="list-style-type: none"> 1. Meet with institutional leadership to explain the CSRG budget process, make recommendations and report back to Pillay 2. Renegotiate payments to D2L 3. Have a meaningful conversation about LMS migration strategy 4. Recapitulate today's discussion about D2L to the Learn@UW Executive Committee on 2/23/2015 5. Get a report on the Blackboard Collaborate usage by institution 6. Get reports on Kaltura usage by institution 7. Distribute Learn@UW recommendations for cost savings to the CIO Council 8. Develop a set of recommendations for the CSRG Budget Committee by March 19th 	<ol style="list-style-type: none"> 1. CIOs 2. Sasi Pillay and Ruth Ginzberg 3. Sasi Pillay 4. Sasi Pillay 5. Werner Gade 6. CIOs via their Learn@UW site administrators 7. Olga Turkina 8. CIO Council

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	<p>with waiting until Unizin is viable. Maas believes that pilot campuses would be able to begin using Unizin analytics in the fall. Pokot recommends a re-examination of the Blackboard Collaborate product and the proposed funds for a LMS RFP project manager.</p> <p>Kelli Crane recommended the need for a short statement of the overarching strategy for the UWS Common Systems. Elena Pokot noted that the non-CIO members of the CSRG Budget Committee are asked to do in a few days what requires the dozens of years of experience that each CIO has. High-level roadmaps are needed.</p>		
BI & Interactive Reporting Replacement & Workshop	<p>Kathy Luker reviewed the latest options for replacing Interactive Reporting that were presented to the Common Systems Review Group. The Interactive Reporting tool has been key for pulling together data from multiple sources. The goal is to build a system-wide Business Intelligence (BI) foundation for data-driven decision-making.</p> <p>The proposal is for a three-year project that includes a BI tool, query conversion and staffing. The proposal has four options at differing levels of support. The least expensive option only contains software, maintenance and hardware with small amounts for installation, training, testing, communication and query conversion. Support for a system administrator will be moved from the FASTAR proposal to the BI proposal.</p> <p>Sasi Pillay explained that the operating costs for the proposal are less than current costs. Werner Gade noted that the UWS institutions will have significant query conversion efforts not included in the CSRG budget. Pillay would like each campus to carefully review its queries and focus on common queries across the system. Common data definitions could also reduce the numbers of queries needed.</p>		

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	<p>Pillay has been receiving names for a data governance council and a smaller working group. Jason Fishbain recommended that the CIO Council set BI strategy for the UW System. Ruth Ginzberg noted the need to include requirements for predictive analytics in any RFP even if those capabilities are not purchased in the first round.</p> <p>Alex Deschenes announced a March 12-13 interactive RFI event at the Pyle Center that will also be available remotely. Pillay recommends at least person attend in-person from each UWS institution.</p>		
UWS Common Application	<p>Steve Hahn reported that UW-Madison is considering adopting the national Common Application for potential students in addition to the UW System application in fall 2015. The Common Application is used by 500 schools, including several from the Big-10. UW-Madison is not dissatisfied with the UW System application. Over two-thirds of the institutions that use the Common Application also have their own, parallel application process. The Common Application draws in a lot of applicants, including diverse and high achieving populations.</p> <p>The national Common Application allows participating institutions to ask specific questions. Institutional admitting offices can opt to not see responses to particular Common Application questions, such as criminal background checks. Currently, there is not the fiscal flexibility to pass along the application fee to the applicants. A greater volume of applicants drives the need for a greater number of staff to review them.</p> <p>Applications that come through Common Applications will probably some modifications to fit into the UW System processes. Other institutions may have already developed interfaces to the Common Application.</p>		
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IAM Business Needs – Response	The anticipated work for the IAM core team in 2015-16 was the onboarding of the Shared	Engage senior leadership about the value of the UWS	Sasi Pillay and Olga Turkina

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to CIO Council Request	<p>Financial System to Oracle Identity Manger. This will not happen due to budget cuts, which allows for a reallocation of the team resources to other IAM business needs. A cost estimate is under development for the CSRG Budget Committee.</p> <p>Tom Jordan recapped the business problems surrounding IAM including:</p> <ul style="list-style-type: none"> - multiple institutional affiliations requiring multiple credentials - disjoint identity information - lack of standard processes, tools and interfaces <p>The IAM infrastructure needs the capabilities to:</p> <ul style="list-style-type: none"> - enable consistent service delivery across campuses - retain campus branding and identity - scale to new populations and external partners <p>The proposed approach is to:</p> <ul style="list-style-type: none"> - confirm the charge to the committee - communicate the initiatives to all stakeholders - gather data on essential services, customers and technologies - identify quick wins and inventory existing assets - perform an external scan of higher education and industry - build evaluation principles and criteria - form and rank alternatives - make recommendations 	IAM investments	
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	<p>②</p> <p>The team anticipates that it will need the following assistance:</p> <ul style="list-style-type: none"> - Identification of campus stakeholders - Campus sponsorship outside IT - Prioritization of needs - Assistance in identifying campus costs - Access to campus technology staff and service owners <p>Recommendations for specific projects will be made to the CIO Council in a few months.</p>		
Cyber Liability Insurance	<p>Dave Pulda reported that the initial proposal from the insurance carriers were not satisfactory to the UWS or the state agencies. A set of questions will be developed for several of the UWS institutions in preparation for a joint meeting. Recent industry security breaches will likely drive up the costs of coverage.</p>		
UW Network Update	<p>John Krogman distributed estimated campus assessments for coming years for the UW SysNet. Michael Schlicht noted savings from several sources that were included in the estimates. It is proposed that campus assessments be normalized through FY20 which represents a change from the previously approved budget. Schlicht commended the DoIT teams and the work performed by the institutional IT staff.</p>		
VoIP/UCC	<p>Sasi Pillay reported that UW-Superior and UW-Parkside are looking at a set of shared service pilots based upon a set of requirements. There is no intent to create a mandatory service.</p>		
ITMC Planning	<p>Ilya Yakovlev reported that the UWS institutions are split on whether or not to hold the conference this spring. Some of the subgroups need to meet regardless of whether a broader conference is held. The Council supported a 10:00 am start time to reduce the stay to one night for those who travel from a long</p>		

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	distance.
2015 CIO Meeting Dates & April ITMC	April meeting will be rescheduled to coincide with the ITMC meeting. Additional CIO Council meetings via videoconference will be scheduled.