UNIVERSITY OF WISCONSIN SYSTEM
UW

OFFICE OF LEARNING AND INFORMATION TECHNOLOGY

UW System CIO Council Meeting Notes
September 15, 2016

Attending:

In-person: Werner Gade, David Stack, Chip Eckardt, David Kieper, Mohamed Elhindi, Bruce Maas, Robert Beck, Beth Schaefer, Jordania Leon-Jordan, Sue Traxler, James Barrett, Dan Dunbar, Elena Pokot and guests Jason Fishbain, Ruth Ginzberg, Mike Schlicht, Olga Turkina, and Jenna Weidner

Remote: Jason Winget, Joe Kmiech, Tom Janicki

Approval of Minutes from August Meeting

Review of the August meeting minutes was deferred until the October meeting.

MOR ITLP Report on Help Desk Consolidation

Noelle Fredrick reported that her IT Leadership Program (ITLP) cohort looked at the diversity of help desks, and help desk practices, across the UW System. The cohort did a gap analysis between current practices and the recommendations of the Huron consulting report, which proposed a single Systemwide help desk.

Today, there is no commonality across the UW System help desks and no common IT Service Management (ITSM) tool. However, there is 80% usage of the UW-Madison KnowledgeBase (KB). Student employees work at different levels of support at the different institutions. There is no consistent training for students across institutions. The full-time employees (FTEs) who work at help desks have different roles at the different institutions. Some are split across other day-to-day responsibilities. Some institutions only use FTEs at their help desks on a rotating basis, but not students.

The cohort's first recommendation was to increase level zero support by 100% adoption of the UW-Madison KB. That would enable institutions to back each other up using the knowledge in the database.

The second recommendation was to standardize on one ITSM tool across the UW System. Today, there is a bit over 50% adoption of Footprints. Standardization would lower costs, reduce the number of support staff, improve collaboration and allow for common metrics, escalation paths and service catalogs.

The third recommendation is to move toward regional help desks rather than going immediately to a central Systemwide help desk. A regional model would allow for continuity of operations if an incident occurs.

UW-Platteville will be looking for a different ITSM tool (they are currently on Footprints). How committed are the CIOs to stay with their current tools or to move to other tools to improve collaboration? During the survey, about 60% of the institutions indicated that they would be interested in looking at another ITSM tool.

The CIOs don't feel strongly about regionalization versus the Huron hub and spoke model because once the help desk leaves the campus it doesn't make much difference where it is. There are concerns that the help desk staff may feel threatened by any talk of consolidation. The first step in any consolidation would be to move to a common knowledge base.

Students working in certain support areas are selected more frequently than students from other support areas for internships and the like, which could make it difficult to have a sustainable a student-based model, especially since the Affordable Care Act is limiting their hours. More often than not, students with less expertise and responsibility have a higher turn-over rate than students with more expertise and responsibility.

UW Colleges | Extension has disbanded their level 1 help desk and outsourced it to UW-Madison which required integrating Footprints with Cherwell. The KB is used to provide UW Colleges | Extension information to the UW-Madison consultants. Over time, UW-Madison has been able to handle an increasing portion of the tickets. The UW-Madison Cherwell system can send email to the UW Colleges | Extension Footprints system if a ticket needs to be escalated. The FTEs that once provided Tier 1 support on the UW Colleges | Extension help desk have been upgraded to more technical positions. Through outsourcing to UW-Madison the help desk hours were expanded. Additionally, UW-Madison now provides a service to assist institutions with the process of capturing information from peoples' heads to the Knowledge Base.

The Council agreed that this topic deserves further exploration.

MOR ITLP Report on Reorganizing IT

Jesse Thompson and Sathish Kuether reported that their topic was probably the most politically sensitive of all the ITLP cohorts. The ITLP instructor did not allow the team to define an alternative future state other than the one specified by Huron consulting. The gaps were strategic, cultural and political.

- Strategic: The CIO role may not be open to regionalization if the chancellor sees the CIO as a strategic campus partner. There still needs to be someone to make local IT decisions.

- Cultural: Some institutions may be highly decentralized and similarly some of the UW System institutions may not trust UW-Madison. The CIOs have different relationships with their respective leaderships.

- Political: Huron pushed for a centralized governance model for which there might not be sufficient funding. Also, the UW System institutions value their independence.

Closing one set of the above gaps would likely open the other gaps further.

The recommendations identified three types of reorganization:
1. Reorganizing by attrition would revolve around the retirement or departure of existing CIOs or leaders at other levels in the organization.
2. Reorganizing by skill set would revolve around the abilities of different leaders and functions.
3. Reorganizing by geography is closer to the original Huron recommendation in which a leader would float among multiple institutions. This model would necessitate a strong CIO for the UW System.

At the University of Maine System, the president wanted to brand the entire system as one institution. The effort was very challenging and its still a work in process. The biggest concern is trust if there is not an IT leader available locally.

Bruce Maas explained that UW-Madison is taking a fresh look at IT governance for the campus. A financial analysis shows that 2/3 of the IT spending is outside of central IT. There needs to be institution-wide strategy.

The recruitment for a new UW-Madison CIO will not take place until the governance is right. The Weil and Ross approach will be used to decide who does what. The goal is to move from technologists making decisions, to the institution making strategic decisions.

Reorganizing IT
Werner Gade explained that the two previous topics were on the agenda so as to begin giving the ITLP groups an audience to explain and present all the work they completed. The topics of Help Desk and Reorganizing IT were selected to be the first to drive discussion. However, the help desk topic could be low hanging fruit.

The CIOs are expected to be working smarter not harder. Are we organized correctly for going forward? If we were architecting leadership from scratch, how would we do it? This is similar to the approach that everyone is recommending for the Common Systems Review Group (CSRG).

Today, half of the CIO positions are filled with interims that institutions are not necessarily rushing to fill, which begs the question of whether we have the right model. What should the role of the CIO Council be? Similar questions are coming up amongst the library directors.

The UW System institutions are competing against each other and there will be a push for local implementation for anything that enhances strategic differentiation. In the long run, is it necessary that the UW System institutions will continue to need to compete with each other? Should institutions be competing with their centers of excellence, not their ability to maximize recruitment through technology tools? What are the drivers to bring the institutions closer together?

We will continue to compete as long as we are a federation of universities that are budgeted separately and have our own chancellors who set different missions. What can be done within this framework? When we talk about operational issues, we are not being strategic. The sphere of influence is easier for the operational than the strategic. The hardest strategic conversations are about academic programs and those conversations are often avoided.

Bruce Maas gave his perspective as EDUCAUSE board chair. Nationally, the stature of the UW System has gone down because we have not made the hard decisions regarding obsolete programs and degrees that other systems have made. The leading institutions are all hiring strategic CIOs who are on the chancellor's cabinet, not operational CIOs. If an institution has a long term interim, they lose ground.

The CIOs are positioned to give facts to leaders that they can use to make decisions. A CIO's position is largely dependent upon their perceived value to the institution.

The CIO Council should provide strategy to the UW System CIO who has a strategic role on the CSRG. This morning's session with the Chief Business Officers (CBOs) demonstrated that the CIOs have the same understanding as they do.

The value of UW System Administration is not well understood by the institutions.

The CIOs need to be more engaged with the Provosts, especially through VP Jim Henderson. Henderson needs to see the CIOs as partners.

The CIOs need to make sure they are in concert with the CBOs, Provosts and Senior Student Affairs Officers in advance of the CSRG meetings to ensure the different stakeholder groups are working in concert and the CIOs are not overwhelming the agenda.

Attendance expectations for the CSRG should be made clear and new members should go through an onboarding process.

The provosts need to see the CSRG as a visioning body about issues they care about, e.g., recruiting and retaining students. Data will be a big part of the discussion. Learning analytics needs to be used to drive real time interactions with students, not reports to a provost's office after the semester is over.

Many decisions don't get made, because there is not the data, e.g., cost per credit.

Perhaps Freeman Hrabowski and Jack Seus could be brought in to give a presentation on how their institution has been transformed through acting upon data. UW-Platteville will be in a position soon to show how they are using data for decision making.

UW-Madison faculty will be using Unizin learning analytics dashboards in the spring semester. The CIO Council will like to see the dashboard before it is shown to the provosts and other groups.

It is important for the CIO Council to have a brand as knowledge leaders and those who bring useful innovation to the table.

Additional comments from Bruce Maas:
- In March, Maas submitted his resignation letter. UW-Madison has subsequently been trying to decide on a direction for IT governance.
- Recruitment to fill Mass's position will not be started until after governance is fixed.
- There is no campus-level decision making on overall IT expenditures, which is not good stewardship.
- During the transition, Maas will report to Special Assistant Mike Lehman, who used to be the Interim CBO.
- The recruitment for Maas's position may happen during the summer/fall time period of 2017.
- A decision will be made as to where the new CIO will report once the candidate pool is reviewed.
- Maas will also be focusing a lot on security and fixing relationship problems with major corporations.
- Maas will leave sometime between March and June 30th.
- Maas will continue to live in Madison after retirement.

2016 Meeting Dates	Meeting Time	Meeting Location
October 20th	8:30 a.m.-12:30 p.m.	Videoconference
November 7-8	TBA	ITMC Fall Conference, Paper Valley Hotel, Appleton
★December 15th-16th	Noon-to-Noon	THU.: Van Hise Hall, Room 1820 FRI.: 780 Regent Street, 126A-B

2017 Meeting Dates	Meeting Location
JAN 19th	Videoconference (780 Regent Street, Room 126A-B)
FEB 16th , 17th	In-person, 2-Day Meeting (780 Regent Street): Thu./Fri.
MAR 16th	Videoconference (780 Regent Street, Room 126A-B)
★APR 20th (TBA)	*In conjunction w/ITMC
MAY 18th	Videoconference (780 Regent Street, Room 126A-B
JUNE 14th, 15th	In-person, 2-Day Meeting (780 Regent Street): Wed./Thu.
JULY 20th	Videoconference (780 Regent Street, Room 126A-B)
AUG 16th, 17th	In-person, 2-Day Meeting (780 Regent Street): Wed./Thu.
SEPT 21st	Videoconference (780 Regent Street, Room 126A-B)
★OCT 19th (TBA)	*In conjunction w/ITMC
NOV 16th	Videoconference (780 Regent Street, Room 126A-B)
DEC 14th, 15th	In-person, 2-Day Meeting (660 W Washington & 780 Regent Street): Thu./Fri.

REMINDER:
- *Unless otherwise noted, all meetings are scheduled at 780 Regent Street, Room 126A-B*
- *All one-day meetings are scheduled for the third Thursday of the month*
- *April and October meetings are scheduled in conjunction with the ITMC meetings*
- *June and August two-day meetings are scheduled for a Wednesday-Thursday*
- *February and December two-day meetings are scheduled for a Thursday-Friday*