Centralization: History + Background

- Cyber threats growing due to the technical sophistication of people and how quickly they are learning/using knowledge;
- Comprehensive security audit conducted at CWRU;
- President Snyder and Provost announced CWRU’s commitment to centralize IT university-wide;
- Centralization ensures confidence in security and business continuity efforts at CWRU;
- Centralization efforts implemented in a collaborative, deliberative, thoughtful and inclusive manner.
Centralization: Goals

- Reduce and effectively manage the risk profile of CWRU;
- Ensure business continuity and disaster recovery readiness by leveraging best-practices across the university;
- Improve the “IT experience” across all areas of the university; and,
- Optimize the university’s investments in information technology.
Centralization: Guiding Principles

- Moving culture of “us vs. them” to “we”;
- Establishing a new destination for all; and,
- Honoring the culture and structure of CWRU.
Support and enhance the academic and research mission of Case Western Reserve University through responsive service management, enabling infrastructure, effective administrative systems and innovative solutions.
Information Technology: Vision

A preeminent organization that empowers Case Western Reserve University’s transformational teaching, learning and research.
Information Technology: Core Values

**Adaptability**
We value the ability to remain flexible and responsive to change. We value the input of others and maintain a positive and open attitude towards new ideas. Once a decision has been made, we adjust accordingly and strive to do our best work.
**Service Excellence**
Serving faculty, students and staff is our reason for existing. We continually seek to understand the needs of those who depend on us and strive to exceed their expectations.
Collaboration
We work in a collaborative, cooperative, team-driven environment that encourages both individual and shared excellence in striving to achieve our goals. We value the mutual respect that true teamwork entails.
**Innovation**

We thrive in a culture that is dynamic. We seek, develop and test new ideas to advance the University. There is often no one right answer to a problem, but experimentation drives many projects, efforts, assignments and ultimately opportunities for solutions and continuous improvement.
Information Technology: Core Values

**Integrity**
We revere honesty and adhere to the highest ethical standards in our daily work. We strive for transparency in our operations.
Centralization: Campus Engagement

- Brown Bag Lunch Series
  → 3/17, 4/21, 5/19
- Combined IT Senior Leadership/CTO Meetings
  → 4/12, 5/10
- IT Centralization Leadership Summit Monthly Update Meetings (IT Leaders + Finance Directors)
  → 2/22, 4/14, 5/12
- Administrative Professionals Information Sessions
  → 4/21, 4/28
- IT Centralization Working Groups
  → Bi-weekly communications/events
- Dedicated website; communicate activities/archive
Centralization: Executive IT Support

- All departments transitioned;
- Feedback significantly positive;
- Creating new endpoint strategy for a consistent computing strategy;
- Implement new, managed service for private/shared documents (auditable security controls/secure remote access);
- Provide managed desktop solution for Mac devices;
- Move documents from endpoint devices, external drives and obsolete servers;
- Develop standard purchasing configurations; and,
- ITS reallocated two FTE to augment.
Centralization: UGEN Consolidation

- Approximately 30 persons identified as “IT workers”;
- Meetings with management centers to clarify roles;
- Using guidelines developed by Centralization Personnel Assessment Team;
- Transition scheduled for 7/1, following 30 day intent to transition memo required by Human Resources;
- **Transition Completed:** Student Affairs;
- **Investigative Meetings:** Facilities, Campus Services, Student Financial Services, Controller’s Office, KSL;
- **In Transition:** Advancement Services, Research Administration; and,
- **Still Investigating:** Environmental Affairs, Health Sciences Library.
Centralization: UGEN Consolidation Summary

Currently 13 FTE Impacted

<table>
<thead>
<tr>
<th>Department</th>
<th>FTE</th>
<th>IT worker</th>
<th>Status</th>
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<tbody>
<tr>
<td>Facilities</td>
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<td>Research Administration</td>
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<td>Student Affairs</td>
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<td>6</td>
<td>Transition</td>
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<tr>
<td>Human Resources</td>
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<tr>
<td>Student Financials</td>
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Centralization: Schools + College Consolidation

Dean and Senior Leadership Meetings:

- WSOM (Feb 24) - Follow up meeting to be scheduled
- CAS (Mar 21) - Follow up meeting to be scheduled
- NURS (May 9)
- DENT (May 9) - Follow up meeting scheduled for 6/13
- SOM (May 24)
- CSE (May 26)
- LAW (June 6)
- MSASS (June 13)
Centralization: Schools + College Consolidation
Centralization: Working Groups

- Personnel
- Hardware + Infrastructure
- Service Management
- Budget + Finance
- Security + Policy

Assessment  
Gap Analysis  
Migration / Implementation

Communication
Working Group: Hardware, Infrastructure + Apps

- Charter completed and approved
- Two sub-committees formed:
  - First committee focusing on how to assess the risk of the servers; move riskiest servers to the data center
  - Second committee working on an end-point strategy for the university
Working Group: Hardware, Infrastructure + Apps

- Risk Assessment
  - Risk analysis form complete
  - High-level project plan created
  - Assessment for server inventory complete
  - Network scan complete
  - Engagement with campus-wide system administrators
Working Group: Hardware, Infrastructure + Apps

- Server Relocation
  - Phase One: MSASS, Nursing, Dental, Law (completed), Weatherhead
  - Phase Two: School of Medicine, Engineering, Arts and Science
- Network scan/review Default Protect results
- Review/update support processes: patching, backup, monitoring, change management, data center access
Working Group: Service Management

- Completed gathering of high-level service management data
- Distributed IT areas need to identify current state volume
- Gathering detailed list of services from distributed IT areas
- Developing strategies to continue to improve service levels: focusing on Self-Help, better Dashboard, reviewing Incident Model, cleaning up Knowledge Base Articles
Working Group: Budget + Finance

- Approved how salary and non-salary IT expense should be budgeted for FY17
- FY17 budget guidelines reviewed
- Management centers budget both salary and non-salary IT expense on a business as usual basis for FY17
- FY17 budget submission to the Office of Planning and Budgets in May
Working Group: Budget + Finance

- Measure efforts to optimize IT spend
- Qualify baseline level spend across the university
  - Business officers will report FY16 budgeted non-salary IT expense
  - Procurement TO compile reports for FY15
  - For transparency and understanding, ITS will provide business officers an overview of FY16 and proposed FY17 IT expense
Working Group: Security + Policy

- Reviewed various policy needs and completed a ranked list of new policy guidance needed
- Reviewed the current security policy list and created a list of changes and updates
- Reviewing the IU IT-28 Risk Mitigation policy as a model for deliverables both for this workgroup and from the Deloitte Review
- Reviewed personnel policies, in particular security awareness training and in-depth security knowledge requirements for Power User/Administrators
Working Group: Personnel

- Guidelines created

  → Differentiating IT work from non-IT work
  
  → Deciding whether someone carrying out IT work should be part of the new university IT organization rather than a part of some non-IT organization
Working Group: Personnel

- Identification of IT staff at the university was complete for all non-UGEN groups except for final confirmation from the IT directors for CAS and MSASS
- Identification of IT staff for UGEN near completion
- Recommendations that (a) future IT position requisition should be screened by HR and vetted by the CIO and (b) IT staff who do not become a part of the new university IT organization should have a well-defined relationship with the new IT organization
Centralizing IT: Brown Bag Lunch Series

Questions + Answers
Breakout Sessions: Topics for Consideration

- Core IT team staffing requirements for each school
- Low-hanging fruit for professional development
- Building community and trust in the new IT organization
- Structuring support across the enterprise. Core requirements
- Improving communications across IT
- Ideas to engage IT staff in the centralization process