ALL HANDS MEETING
Technology Updates. Celebrating People.
Remarks

Barbara R. Snyder, President, CWRU
Remarks

W. A. “Bud” Baeslack, Provost + EVP, CWRU
"Since joining University Technology, my team has begun building and strengthening relationships with IT staff from across the university. This includes shared projects such as server migration/consolidation, grass-roots efforts such as the new campus web developers group and professional development opportunities such as the MOR Leadership program. As we learn about the strengths and capabilities of our colleagues throughout UTech, we will realize increased efficiencies and improve the impact of our services."

*Eileen Connell, [U]Tech, Weatherhead School of Management*
71 IT professionals from six UGEN units, all the Schools and the College have joined UTech – all have gone through HR processes

Continue transitioning Medical School at department level

Identified representatives from all the UGEN units, Schools and College to ensure needs are being met
## Centralization Overview - Personnel

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>STUDENT AFFAIRS</td>
<td>JAN 5</td>
<td></td>
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<tr>
<td>UGEN</td>
<td>JULY 1</td>
<td></td>
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<tr>
<td>RESEARCH ADMIN</td>
<td>AUG 1</td>
<td></td>
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<tr>
<td>FACILITIES</td>
<td>AUG 15</td>
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<tr>
<td>LIBRARY</td>
<td>OCT 1</td>
<td></td>
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<td>LAW</td>
<td>NOV 1</td>
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<td>NOV 30</td>
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<td>WSOM - ITG</td>
<td>DEC 30</td>
<td></td>
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<tr>
<td>SOM</td>
<td></td>
<td></td>
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<tr>
<td>WCOM</td>
<td></td>
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</tr>
<tr>
<td>MSASS</td>
<td></td>
<td></td>
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<tr>
<td>UNV RELATIONS</td>
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<td></td>
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<tr>
<td>DENTAL</td>
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<tr>
<td>CAS</td>
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<tr>
<td>CSE</td>
<td></td>
<td></td>
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<tr>
<td>SECURITY SYSTEMS</td>
<td></td>
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</table>

### Personnel Transitions

- **Initial IT Work Guidelines**: JAN 5 - MAR 23
- **Updated IT Work Guidelines**: MAR 12 - JUN 14
- **Creating Unified IT Culture Guidelines**: MAR 1 - JUN 14
- **Professional Development Guidelines**: MAR 1 - JUN 14
## Centralization Overview - Personnel

### Staff from Decentralized IT Transitioned into Utech by Month and Management Center

<table>
<thead>
<tr>
<th>Management Center</th>
<th>Research Admin</th>
<th>Student Affairs/Campus Sys</th>
<th>Facilities</th>
<th>Library</th>
<th>Law</th>
<th>Academic and Administrative Computing</th>
<th>WSOM - ITG</th>
<th>Nursing</th>
<th>WSOM Classroom Tech</th>
<th>University Relations and Development</th>
<th>MSASS</th>
<th>Dental</th>
<th>CAS</th>
<th>CSE</th>
<th>Security Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Filled Positions</td>
<td>4</td>
<td>6</td>
<td>1</td>
<td>1</td>
<td>6</td>
<td>13</td>
<td>8</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>4</td>
<td>6</td>
<td>0</td>
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<tr>
<td># of Open Positions</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total # per Month</td>
<td>27</td>
<td>46</td>
<td>19</td>
<td>46</td>
<td>50</td>
<td>71</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Does not include IT staff reporting to researchers nor two individuals in Public Safety*
Centralization Overview - Personnel

• Next:
  ✓ Ongoing communication and engagement
  ✓ Skills assessment
  ✓ Emphasis on UTech culture; Core Value Awards
Centralization Overview – Service Management

- Assessed and evaluated current model
- Developing larger organizational model
- Gathering requirements for new service management platform
- Determining best business case for desk side support
Centralization Overview – Hardware + Infrastructure

"Relocating the law servers to the UTech data center went very smoothly. We retained all of the access to the servers our team required, but we no longer had to worry about maintaining our own physical data center. We gained enterprise quality monitoring, access controls, etc., as well as better support from UTech engineers. Overall, it was a huge improvement."

*Tron Compton-Engle, [U]Tech, Law School*

“The process was quite painless and very efficient, mostly due to the staff’s professional attitude.”

*Tom Franchina, [U]Tech, MSASS*
Centralization Overview – Hardware + Infrastructure

• More than 700 servers identified for relocation, virtualization or decommissioning
• Moved 45 servers, decommissioned 21 servers
Centralization Overview – Hardware + Infrastructure

Server Homes: As Is

Server Homes: To Be

- Raised Floor
- Universal Power Supply
- CRAC Units

- Two data center locations on campus, plus an external source and cloud services
- Enterprise firewalls and security team
Centralization Overview – Hardware + Infrastructure

## Servers Identified Outside Data Center*

<table>
<thead>
<tr>
<th>Management Center</th>
<th># of physical servers</th>
<th># of virtual servers</th>
<th># of physical/virtual servers moved</th>
<th># of physical servers identified to be shut down</th>
<th>Servers not under warranty</th>
<th>Operating System not supported</th>
<th>Square Footage Gained</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Science</td>
<td>15</td>
<td>12</td>
<td>10</td>
<td>2</td>
<td>3</td>
<td></td>
<td>16</td>
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<tr>
<td>University General</td>
<td>35</td>
<td>0</td>
<td>5</td>
<td>2</td>
<td>7</td>
<td>2</td>
<td>16</td>
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<tr>
<td>Engineering</td>
<td>77</td>
<td>343</td>
<td>0</td>
<td>53</td>
<td>572</td>
<td></td>
<td></td>
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<tr>
<td>MSASS</td>
<td>3</td>
<td>1</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Law - Phase 2</td>
<td>0</td>
<td>17</td>
<td>17</td>
<td>7</td>
<td>168</td>
<td></td>
<td>225</td>
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<tr>
<td>Medicine</td>
<td>87</td>
<td>51</td>
<td>2</td>
<td>2</td>
<td>59</td>
<td>7</td>
<td>225</td>
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<tr>
<td>Weatherhead</td>
<td>5</td>
<td>21</td>
<td>0</td>
<td>4</td>
<td>150</td>
<td></td>
<td></td>
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<tr>
<td>Dental Medicine</td>
<td>6</td>
<td>31</td>
<td>0</td>
<td>2</td>
<td>80</td>
<td></td>
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<tr>
<td>Nursing</td>
<td>2</td>
<td>5</td>
<td>7</td>
<td>2</td>
<td>1</td>
<td></td>
<td>80</td>
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<td>Total</td>
<td>230</td>
<td>481</td>
<td>45</td>
<td>21</td>
<td>126</td>
<td>9</td>
<td>1,311</td>
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</tbody>
</table>
Centralization Overview – Hardware + Infrastructure

Preparing Servers for the Data Center

- Firewall Rules
- Security Scan
- New IP Address
- Validate DNS

Preparation Progress

- DNS: 40%
- Scan: 50%
- New IP: 60%
- Firewall: 40%

Green = Preparing for Move
Blue = Moved
Centralization Overview – Hardware + Infrastructure

Case School of Engineering: Largest Server Population

- 400+ Servers
- Well-consolidated population
- Three phases
  - Beginning planning now
  - Major phase scheduled between Spring and Summer Semesters
Questions + Answers
Aligning with the Strategic Plan - Initiative VIII: Attract, Retain and Empower Technology Team Members

Putting the right people with the right skills in the right roles, in order to enable the University’s success, achieve [U]Tech’s strategic objectives and optimize the work environment

[U]Tech Vision
To be a preeminent organization that empowers CWRU’s transformational teaching, learning and research
Centralization Overview – Finance + Administration

Talent Management Framework

- Talent Assessment and Planning
- Talent Acquisition/Sourcing
- Rewards and Recognition
- Performance Management
- Learning and Development
Talent Assessment and Planning

Currently:
• Vacancy assessment / replacement justification
• Job families / classifications

3-6 Months:
• Core and Technical Competency Identification (Skills Assessment Database)
• Retention / Attrition Assessment (ongoing)
Talent Acquisition and Sourcing

Currently:
  • Orientation / onboarding
  • Buddy program
  • External job advertisements

3 – 6 Months:
  • Inform all staff of UTech openings via website
  • Assess and enhance onboarding program (continuous)
Performance Management

Currently:
• Annual performance review with self-assessment
• Management Coaching
• Performance Improvement Plans

3-6 Months:
• Performance Assessment Pilot
• Train managers and staff to do quality performance reviews
• Shift all [U]Tech staff to a July 1 review date
• Change culture on giving and receiving feedback
Rewards and Recognition

Currently:
• Recognition of staff promotions
• Community building activities/functions
• Service Anniversary recognition

3-6 Months:
• [U]Tech Core Value Awards
• Improve recognition around successes
Learning and Development
Currently:
• University Training Programs
• MOR Leaders Program
• Dively Executive Education Affiliate Program
• DISC Workstyle Assessments
• Vendor-supported technical training
• Memberships in professional organizations
• Staff-led common interest groups
• Staff development workgroup
Learning and Development

3 – 6 Months:
• Expand involvement in Staff Development workgroup
• Expand participation in Dively Exec Ed Program
• Participate in university-wide programs
• Customized ALICE (Active Shooter) Training
• Assess professional development needs for all of [U]Tech (continuous)
• [U]Tech staff development website
Centralization Overview – Finance + Administration

UTech Employee Training + Resources

UTech has established a training program to aid our staff in building their skills to be successful and in its mission of operational excellence.

Working, learning and teaching resources.

Every member of the University Technology team is essential to the success of delivering our mission to support and enhance the academic and research mission of Case Western Reserve University through responsive service, enabling infrastructure, effective administrative systems and innovative solutions. To ensure the UTech team has access to training + resource information, this website has been developed.
Questions + Answers

- Culture change; celebrating success
- Reminder of the importance of individuals
- Working to ensure everyone feels a part UTech
- Core Value Awards; much more to come
Retirement Celebration - Evan Komito + Pat Greene