FY2022 Operational Review Committee Final Report

Unit Reviewed: University Technology Solutions
Date: March 2022

Unit Presentation Requirements

The following items are required materials for the unit presentations. The units presented to the committee and questions were encouraged. The units provided additional or supplemental information as deemed appropriate.

- General Information to "Tell Your Story"
  - How unit aligns to University goals
- Organizational Chart and Position / Staffing Information
- Opportunities and Strengths
- What is going well? What requires improvement?
- Key Performance Indicators, Benchmarks, and Surveys
- Five Year Financial Pro-forma
- Reserves and Balances

Goals and Initiatives

- The presentation was thorough, offering a good historical background and big picture view of a very complex division. The capabilities and initiatives detailed in the presentation are well aligned with the goals and mission of both UTS and the University. Furthermore, the KPIs and associated activities and metrics are in sync with UTSA's destinations.

- The discussion around challenges and opportunities suggests that UTS has engaged in careful mid- and long-term planning around future staffing needs, expenses, potential collaborations, etc.

- The biggest challenge for any IT operation is prioritization and workload capacity. While these components are being addressed, a clear articulation of their governance process would have provided valuable insight. The presentation highlighted how the unit uses stakeholder feedback to identify challenges and inform how UTS can support other units in meeting the University's mission and strategic initiatives.

- Many of UTS's initiatives are described with IT jargon - terms that are difficult for a non-IT person to understand. Some slides/talking points could have used some additional translation into layperson's terms to better convey implications and overall impact to the University.

Organization

- The presentation from UTS was very informative and helpful in understanding the range of services the unit provides to the University community. Although they presented an organizational chart that showed the different lines of business, it would have also been informative to indicate the new services that have been incorporated and/or enhanced under Vice President Ketchum. Identifying the evolution of the services was verbally described and the chart of the services could have better helped the committee understand how needs have also grown and are being met.

- We appreciated the mention of how important infrastructure and security are; UTSA needs to stay competitive and proactive in these areas to propel the University and our students forward. The Tech Cafe operations and structure could have been explained a bit more.

- The overall organization of the information was excellent. It is very clear that the division has accomplished a lot over the last few years under this new structure and leadership.

Operations

- UTS offers key areas of operation that align with the three UTSA strategic goals:
  (1) Student Success (infrastructure excellence, including network modernization, and IT innovation, including data and information management);
  (2) Great Public Research University (including application and development excellence and research IT/innovation); and
  (3) An Exemplar for Strategic Growth and Innovation (focusing on cyber security and strategic services, like Tech Café Franchise and financial optimization).

- UTS had 14 years of infrastructure deferred maintenance when Vice President Ketchum arrived in early 2019. UTS is considering the procurement of loans to address long-term lifecycle replacements in excess of $5M. UTS should consider classifying and prioritizing deferred maintenance of IT infrastructure based on risk and addressing the high-risk items with loans.

- The service offering provided by UTS is very similar to other universities, although they are not able to provide data warehousing. The IT structure is decentralized which allows efficient and reliable administration, improves local development, and allows for flexibility and accessibility within each unit.

- Progress: The efforts of UTS, even with the pandemic, have pivoted to an online presence with an adoption of 90%. UTS has increased the storage to ARC to 80% for users. In the last three years, UTS increased efforts with their Service Now platform across decentralized units from 29% to 96%. Customer satisfaction is about an A- (up from a D-

on VP Ketchum's arrival). The biggest concern about the customer satisfaction surveys is that no response rate was reported and perception amongst the committee was that it may not be reflective of experiences.

- Collaborations: UTS has started a shared partnership to attempt to centralize IT personnel. Some academic colleges have entered into these agreements, but the presentation did not specify what proportion of units have shifted to the shared model and what proportion are still hiring their own support. This needs to be systematic or at least clarified.

- As part of the UTS five-year plan, the committee recommends that UTS reaches out to each department to assess individual department needs and issues. Departments are often unaware of all the services UTS provides. Making UTS more visible and accessible to departments would be very helpful.

Finance

- Clarity and IRM: In the presentation to the ORC, there was a lack of clarity related to the financial situation and projection of UTS. In particular, the non-personnel expenditures were not clearly identified, with all expenditures lumped into one $9M M&O category. There was also a distinct lack of resolve to adhere to the IRM budget model, with large negative balances being projected in future years, including a cumulative $14M shortfall by FY26. The solution to this significant problem seems to be "requesting more funding from the University." We have provided an appendix with additional details about the lack of clarity in the financial statements (see attached).

- Reserves: During the UTS ORC Presentation, VP Ketchum stated that, with good strategic planning, maintaining a financial reserve was unnecessary. Later, she indicated that UTS had a shortfall of about half a million dollars due to decreases in enrollment. While she reasonably pointed out that UTS is impacted but cannot directly influence enrollment, this sort of variance is precisely what a financial reserve is supposed to address. The ORC recommends that UTS begin to maintain a reserve in case of such shortfalls in the future.

- University Phone System: UTS oversees the UTSA Telecommunications System. In 2022, this system has costs of $975,000 in the PBX Presidio payment, $1.6 million in payroll and M&O for a total cost of approximately $2.6 million. The anticipated telecommunications revenue in FY 2022 is approximately $1.1 million, thus implying a shortfall of almost $1.5 million. In FY 2023, UTS anticipates costs of about $2.2 million, anticipated revenues (at $285 per line) of $1.05 million, for a shortfall of slightly more than $1.1 million. The UTS presentation mentions that costs per line need to be almost $600 to cover FY 2023 expenses.

  We believe there is an opportunity for UTSA to significantly decrease telecommunications costs going forward. This would require a new telecommunications plan, with a shift away for most faculty and staff having land lines to using internet or

other means of communications. We believe most faculty and staff only minimally use their land lines, with Zoom, WebEx, and cell phones used much more than land lines.[1] Rather than continuing the current expensive and largely wasteful system, UTSA should endeavor to accelerate the change away from land lines. Each department could keep one or two land lines as needed, and labs may need land lines for emergencies, but we believe most phones could be eliminated from faculty and staff offices. To accelerate this trend, UTSA may consider small incentives (say $100) for faculty who give up their land lines.

Of course, this change would require switching to a different phone system/payment plan, otherwise the per line charge would dramatically increase over the current $600. We recommend a mini-task force, made up of members from UTS, the VPBA's office, and Academic Affairs, to assess how to lower UTSA's total telecommunications costs while keeping essential services in place.

Assessment

- Overall, University Technology Solutions does a good job providing critical services to the university community in an environment that continues to be challenged by Covid-19 and budget constraints.

- While UTS provided evidence and addressed the alignment of their goals with UTSA's destinations, there is a concern that their connections to the university's strategic initiatives need to be further refined.

- We strongly encourage UTS to continue to explore additional cost savings paths. Specifically, while UTS has done an excellent job with the development of Service Now – which has had success in both adoption and efficiency, eSignature and other significant environmental savings, and a focus on automation to increase efficiencies – there is a concern that UTS may not have the fiscal and/or personnel resources necessary to address emerging technology challenges.

- We found it quite encouraging that UTS has addressed some serious transparency issues that are a legacy of previous leadership. This transparency has led to a relatively efficient prioritization of their responsibilities. That said, UTS still faces challenges that will require future staffing and funding in order to overcome current difficulties and future threats. We strongly encourage the unit to identify more benchmarks for its own success, including benchmarks it publicizes on customer service and satisfaction. There is a substantial concern about the reporting and response rates. While UTS claims good scores, we respectfully suggest that data transparency quality assurance measures be employed. While the unit reports a 92.53% satisfaction rate, a substantial number of surveys are not answered. Additionally, UTS employs a simple thumbs up or thumbs

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[1] UTS most likely has data on how often the land lines are used for outgoing calls (many incoming calls are most likely spam).

down satisfaction measure which is not an effective measure of customer satisfaction. While they report that they have about 1,000 "thumbs up" out of approximately 38,000 tickets, in reality the number of reported positive ratings is less than a 3% of the reported tickets. A low response rate does not depict the areas of strength or improvement that UTS may need to address. While much of the response rate can likely be attributed to a lack of attention or interest on the part of customers, we wish to note that UTS must be mindful of statistical reporting as well as common benchmarking practices regarding customer service surveys. Such surveys aren't a useful measurement with a low response rate. The use of the small number of responses could, in fact, lead to the development of KPIs are unrealistic and/or impossible to achieve.

- A current and future concern that must be addressed by both UTS and the university's leadership is the lack of a reserve. This is a serious and ongoing problem. While UTS has focused on 5-year planning and forecasting for the effective use of their funds, there is a need to consider how UTS is funded and what dedicated revenue streams should be employed to maintain a high level of quality.

- While UTS provided KPIs that connected their strategic plan to the university's strategic plan, there is a concern that the KPIs that they offered were mostly milestones rather than performance indicators. We recommend that UTS clarify what metrics they are employing and determine if the KPIs that they have developed are the right ones. We strongly suggest that this be data-driven and based on best practices found within university-based technology service organizations. We also believe that there is a need to provide and report data that clearly links metrics to performance over a longer period of time. Such an approach not only confirms trends but provides a more robust understanding of the issues faced by UTS.

- One issue that is of particular concern regards a culture of continuous improvement. While there is evidence of pursuing this, that satisfaction survey data suggests that there is room for improvement. The challenges that they have encountered suggest that they have identified measures to improve the customer experience.

- UTS has responsibility for a portion of UTSA's academic computing as well as collaborative oversight of research computing services. It also provides computing support to the university community. Little evidence was provided on these aspects of UTS' operations. We believe that it would serve the unit's interests to provide customer satisfaction data in this area of their operations. We believe that it is an opportunity to demonstrate their level of success in an area of critical importance to the university community.

Appendix

Operational Review Committee – UTS Financial Writeup

In the presentation to the ORC, there was a lack of clarity in the financial situation and projection of UTS. The "Current Year Position Dollars by Fund" only displayed the employee position expenditure budget:

VP Information Management and Technology - Current Year Position Dollars by Fund												
Dollars by Fund	E&G and Designated Tuition		Other Designated (Fees, Sales & Service, Official Occasions, etc.)		Auxiliary Sales and Services and Fees		Restricted Gifts and Endowment Earnings		Total	
	Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant
Original Budgeted Positions by Funding										
Classified	$ 1,198,019	$ -	$ 7,194,790	$ 379,275	$ -	$ -	$ -	$ -	$ 8,392,809	$ 379,275
A&P	$ 248,636	$ 85,284	$ 1,626,155	$ 90,060	$ -	$ -	$ -	$ -	$ 1,874,791	$ 175,344
Unallocated		$ 62,686		$ 373,505		$ -		$ -	$ -	$ 436,191
Total FTE in Original Budget	$ 1,446,655	$ 147,970	$ 8,820,945	$ 842,840	$ -	$ -	$ -	$ -	$ 10,267,600	$ 990,810
Unbudgeted Positions (Funded from Year-to-Year with one-time funding)										
Classified	$ 66,000		$ 646,998						$ 712,998	$ -
A&P			$ 233,850						$ 233,850	$ -
Total FTE Unbudgeted	$ 66,000	$ -	$ 880,848	$ -	$ -	$ -	$ -	$ -	$ 946,848	$ -
Original Budgeted Positions not to be Filled								$ 195,400	$ 751,448

The total sum of all position budgets is $12,009,858, but this is only approximately half of the expenditure budget. It is unclear what the other half of the budget is going toward. On the "Anticipated Future Major Funding Expenses" slide, larger expenses are displayed in high-level, non-financial format.

UTSA The University of Texas at San Antonio — Anticipated Future Major Funding Expenses

Fiscal Year	Expense Description	Annual Expense
FY23 (annual)	Palo Alto Maintenance (firewall hardware for 3 appliances), previous contract on other appliances expires in FY25 and price will double for all 6 appliances, XSOAR	$430,000 annually $2M for FY25 for new appliances *LCR*
FY23 (annual)	Red Hat EL Ansible & Licensing (Red Hat Enterprise Licensing) Linux OS Software	$350,000 annually
FY23 (annual)	Extra Hop (Cyber Security to monitor network traffic)	$300,000 annually
FY23 (annual)	Ellucian Experience (first year funded by SIF, but no plans for funding moving forward)	$250,000 annually
FY23 (annual)	ServiceNow (parts funded by SIF), assumes no additional licensing or products added to current contracts	$700,000 (estimated after current contracts expire)
FY23 (annual)	Network modernization	~ $2M (if $8M investment up front, $2M annually after 5 yrs)
FY24 (annual)	Microsoft A5 expense moving from system to each campus	$1.2M (estimated, annual)
FY24 (multi-year contract)	Infoblox licensing (physical and virtual, hardware in future)	$1M (3 yr contract)
FY25 (annual)	ACIRP maintenance and licenses, does not include ARC	$3M annually (unless another deal is negotiated)
FY25 (multi-year contract)	Forescout (to replace Clear Pass, paid w/ HEERF in FY22, 3-yr contract)	$1.1M (3 yr contract)
FY26 (annual)	VDI2 maintenance and licenses VMWare	$2M annually

The yellow highlight was added in an effort to distinguish the costs that will be facing UTS next year, which totals $5.73M in additional costs (FY23). This is not clearly portrayed in the presentation.

In the "UTS Final VPIMT Pro Forma March 2022" workbook which was submitted to the ORC separately, it is not transparent what the expected costs are that fill out the other half of the budget. They appear to lump it all into M&O, with the M&O year-end projection being $8,883,171.

			5 Year Financial Proforma As of October 31, 2021									
	FY 2020 Actuals	FY 2021 Actuals	FY 2022 IRM Statement	FY 2022 Original Budget	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection
Direct Expenses - Non-Personnel												
M&O Budget	9,299,906	6,608,434	7,301,363	6,247,181	6,247,181	7,533,171	1,350,000	8,883,171	8,916,295	10,852,518	16,513,363	15,617,346

That number increases substantially in FY24 and then again in FY25, but it is not clear from the statement why or what costs UTS is referring to here.

Another example of a lack of clarity in the Pro Forma sheet is in the Operational Transfers section. There is a list of 4 "Transfers To (From) Other Units" but no definition of which unit(s). See highlighted section below:

	FY 2020 Actuals	FY 2021 Actuals	FY 2022 IRM Statement	FY 2022 Original Budget	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection
OPERATIONAL TRANSFERS												
Operating Transfers - To (From) Other Units												
Transfers To (From) Other Units	1,608,891	1,367,620	2,150,918	1,367,620	1,367,620	1,367,620	-	1,367,620	-	-	-	-
Transfers To (From) Other Units	1,200,291	1,200,291	-	698,800	698,800	469,184	229,616	698,800	755,000	800,000	825,000	850,000
Transfers To (From) Other Units	300,000	300,000	-	-	-	-	-	-	-	-	-	-
Transfers To (From) Other Units	499,892	435,378	-	435,378	435,378	435,378	-	435,378	-	-	-	-
Total Operating Transfers - To (From) Other Units	$ 3,609,074	$ 3,303,289	$ 2,150,918	$ 2,501,798	$ 2,501,798	$ 2,272,182	$ 229,616	$ 2,501,798	$ 755,000	$ 800,000	$ 825,000	$ 850,000

Do two of those three transfers from FY22 just disappear in FY23 and in future years? It seems so, but we have no idea what those transfers are for or where they are going.

While it was disconcerting that the UTS leadership did not feel the need to continue to carry a reserve, the trajectory of going significantly over budget seems to be forecasted in the Pro Forma statement, with a $14M shortfall over the next few years.

Reserve Funds	FY 2020 Actuals	FY 2021 Actuals	FY 2022 IRM Statement	FY 2022 Original Budget	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection
Reserve Fund Beginning Balance	-	2,296,749	-	2,298,666	2,298,666	2,298,666	-	2,298,666	(482,716)	(2,570,096)	(2,026,141)	(8,032,397)
Lapsed Amount Added to / Removed from Reserve Funds	(5,374,672)	(652,386)	-	(51,852)	(479,284)	6,398,439	(9,179,822)	(2,781,382)	(2,087,380)	543,956	(6,006,257)	(6,051,469)
Other Activity in Reserve Fund (explain)	7,671,421	654,303	-	-	-	-	-	-	-	-	-	-
Reserve Fund Ending Balance	$ 2,296,749	$ 2,298,666	$ -	$ 2,246,814	$ 1,819,382	$ 8,697,106	$ (9,179,822)	$ (482,716)	$ (2,570,096)	$ (2,026,141)	$ (8,032,397)	$ (14,083,866)

Information Management and Technology

Operational Review

Kendra Ketchum
Vice President for Information Management and Technology

Mission

To be a **strategic partner** that provides quality and innovative solutions and services to students, faculty, staff, and the community.

Vision

Our vision is to be a trusted partner in developing solutions that **advance** educational **excellence** and research at UTSA.
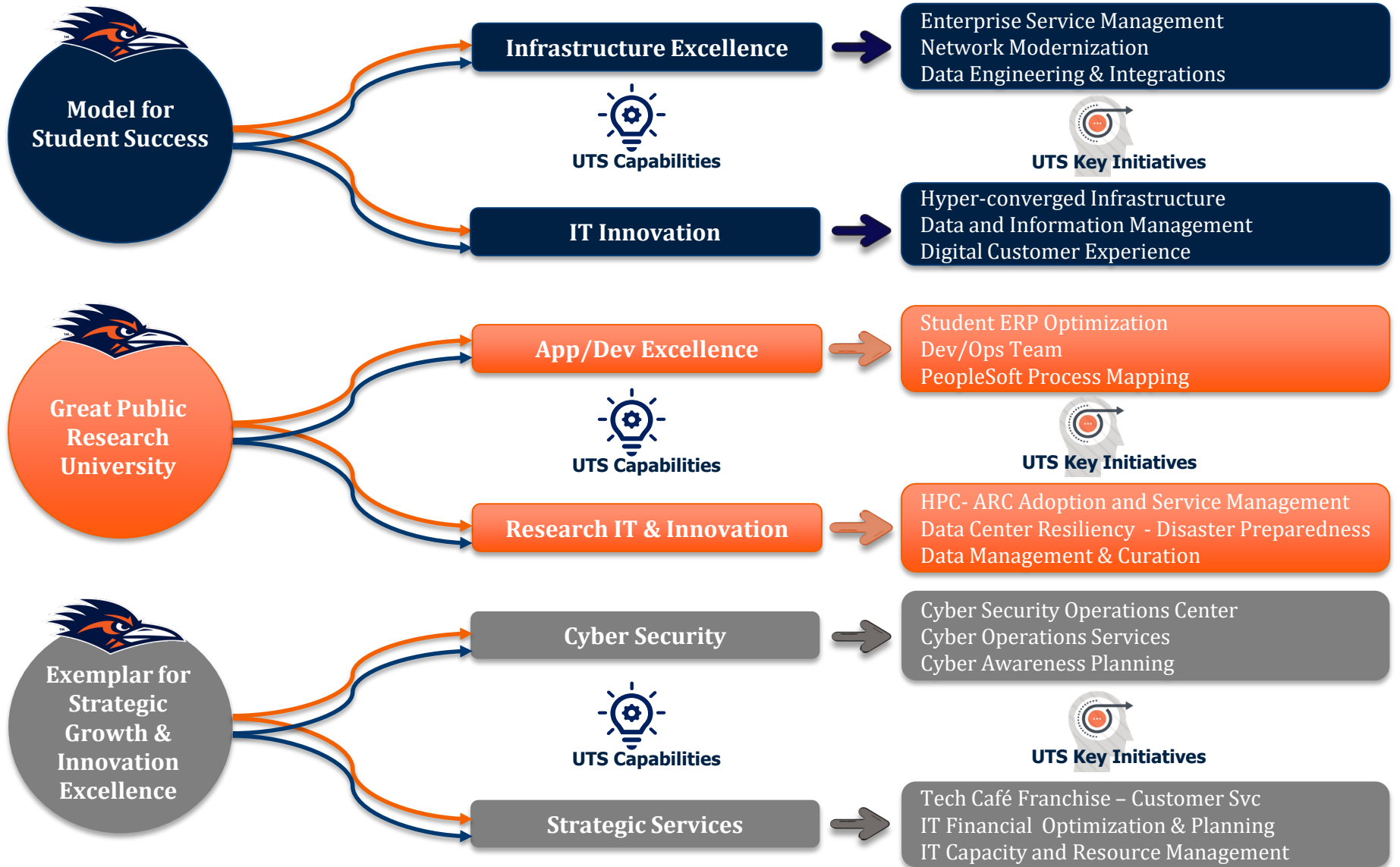
Values

Embody the UTSA Core Values.

Exemplify UTS as a culture of service in our interactions with each other and our customers.

UTSA. The University of Texas at San Antonio™

Model for Student Success

Infrastructure Excellence

UTS Capabilities

UTS Key Initiatives

Enterprise Service Management
Network Modernization
Data Engineering & Integrations

IT Innovation

Hyper-converged Infrastructure
Data and Information Management
Digital Customer Experience

Great Public Research University

App/Dev Excellence

UTS Capabilities

UTS Key Initiatives

Student ERP Optimization
Dev/Ops Team
PeopleSoft Process Mapping

Research IT & Innovation

HPC- ARC Adoption and Service Management
Data Center Resiliency - Disaster Preparedness
Data Management & Curation

Exemplar for Strategic Growth & Innovation Excellence

Cyber Security

UTS Capabilities

UTS Key Initiatives

Cyber Security Operations Center
Cyber Operations Services
Cyber Awareness Planning

Strategic Services

Tech Café Franchise – Customer Svc
IT Financial Optimization & Planning
IT Capacity and Resource Management

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KPI	UTSA Destinations	Activities	Metric	Trends
Digital Customer Experience	Student Success	• Enterprise Service Management • Network Modernization • Dev/Ops Team • Tech Café Franchise • Data and Information Management	➡ Complete the CSM implementation for all BSCs by Q4 of 22 ➡ 4 year plan w/ annual phasing of new equipment replacement to finish by 2025. ➡ Complete the hiring of the new team and implement by Q4 22 ➡ Create a franchise with COB and COS by Q423 ➡ Create the group and hire an AVP of DIM and work on enterprise data warehouse.	90% adoption of SN in decentralized IT areas.
Research IT Excellence	Research Excellence	• HPC/ARC Adoption • Data-Center Resiliency • Research IT Services • Data Management & Curation	➡ Increase the utilization and adoption of ARC by 40% by Q4 of 23 ➡ Create a full DR strategy and plan for all data-centers by Q3 23 ➡ Establish Research IT Service Catalog, SLAs, KPIs by FY23 ➡ In alignment with VPREDKE, implement an enterprise data warehouse	
Operations & Innovations	Strategic Growth + Innovation Excellence	• Cyber Security Operations Center • PeopleSoft Process Mapping • IT Financial Optimization & Planning • Data Engineering/Integrations • IT Capacity & Resource Management	➡ Fully implement SOC functional playbooks by FY23 ➡ Aligned with VPBA, document processes and automate workflows by Q2 FY23 ➡ Complete 5 year pro-forma and find sustainable funding model by Q3 FY23 ➡ OBIA data warehouse, data governance & ESB by Q4 FY23 ➡ Compete analysis of resources and demand with sourcing strategies being created where capacity does not meet demand by Q3 FY23	

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The Numbers

TECH CAFÉ

39k tickets resolved

49630 calls

178 loaner laptops distributed

87% excellent customer service

23 FTE

19 PTE

A- customer satisfaction

ARC UTSA

5200 cpu cores

40 nodes

100GB networks

353 TFLOPS

78% increased storage

service now ESM

4140 interactions

38427 incidents

10000 requests

96% adoption ratio

go-live **9/28/20**

Microsoft Teams

61 TB OneDrive storage

2300 new Teams created

cnct
communications | networking | collaboration | technologies
University Technology Solutions

19k total meetings

1k deployed devices

185k participants

7k video meetings

250% increased utilization

webex™

UTSA.eSignature

488 new users

15331 completed signatures

20,979 lb of wood

61,771 gal of water

49,242 lb of carbon

3,409 lb of waste

Environmental savings

What we do. What systems and technology we support. Who we are.

Student Information Systems
Banner9, Ellucian Experience and Workflow and DegreeWorks, mobile app, Xtender

Over 60 integrations into other platforms

Cyber Security
ExtraHop, Palo Alto, Cortex SOAR, IXIA, Semperis, KnowB4, Fortinet, OIS Dept Funding, DUO

Data Storage & Compute
Isilon, VXRail, VMWare, IDPA, Servers

Networking Infrastructure, Telecommunications and Internet Services
Wi-Fi access points, Wired data ports, Network infrastructure hardware, Phone services, Call centers, Campus main phone line, Dark fiber for WAN, Internet

High Performance Computing Research support
ARC

Researcher support

Strategic Services and Digital Customer Experience
BA, BRM, PMO, VMO, governance, capacity management

Knowledge Management

Communication, training, marketing, understanding and addressing stakeholder tech needs, overseeing projects

Data Information Management and Data Warehouse
NEW initiative

Workflow and Process Automation
DevOps

Mulesoft

Enterprise Service Management
ServiceNow HR, CSM, ITBM, ITSM

Portfolio, capacity and resource management, ticket and case resolution

Knowledge base access

Software Platforms for Other Departments (SWAP)
SalesForce, Civitas, Career Center software, Maxient, 25 Live, Jaeggar/TCM, Admit Hub Chatbot, Give Pulse, ServiceNow

StarRez (with record integration)

Remote Work and Instruction
Virtual desktop infrastructure (VDI) with remote access to software and storage

VPN

Blackboard authentication

Tech Café Services
General access lab support

Tiered support for UTSA assets

Franchise opportunities to create economies of scale with distributed IT

ServiceNow, campus locations, email, and phone support

Endpoint Asset Support
Software licensing, provisioning and updates

Enterprise Software Support
Qualtrics, DocuSign, LinkedIn Learning, Microsoft, Lucid Chart and Lucid Sparks

Funding for other smaller subscriptions and licenses for various departments

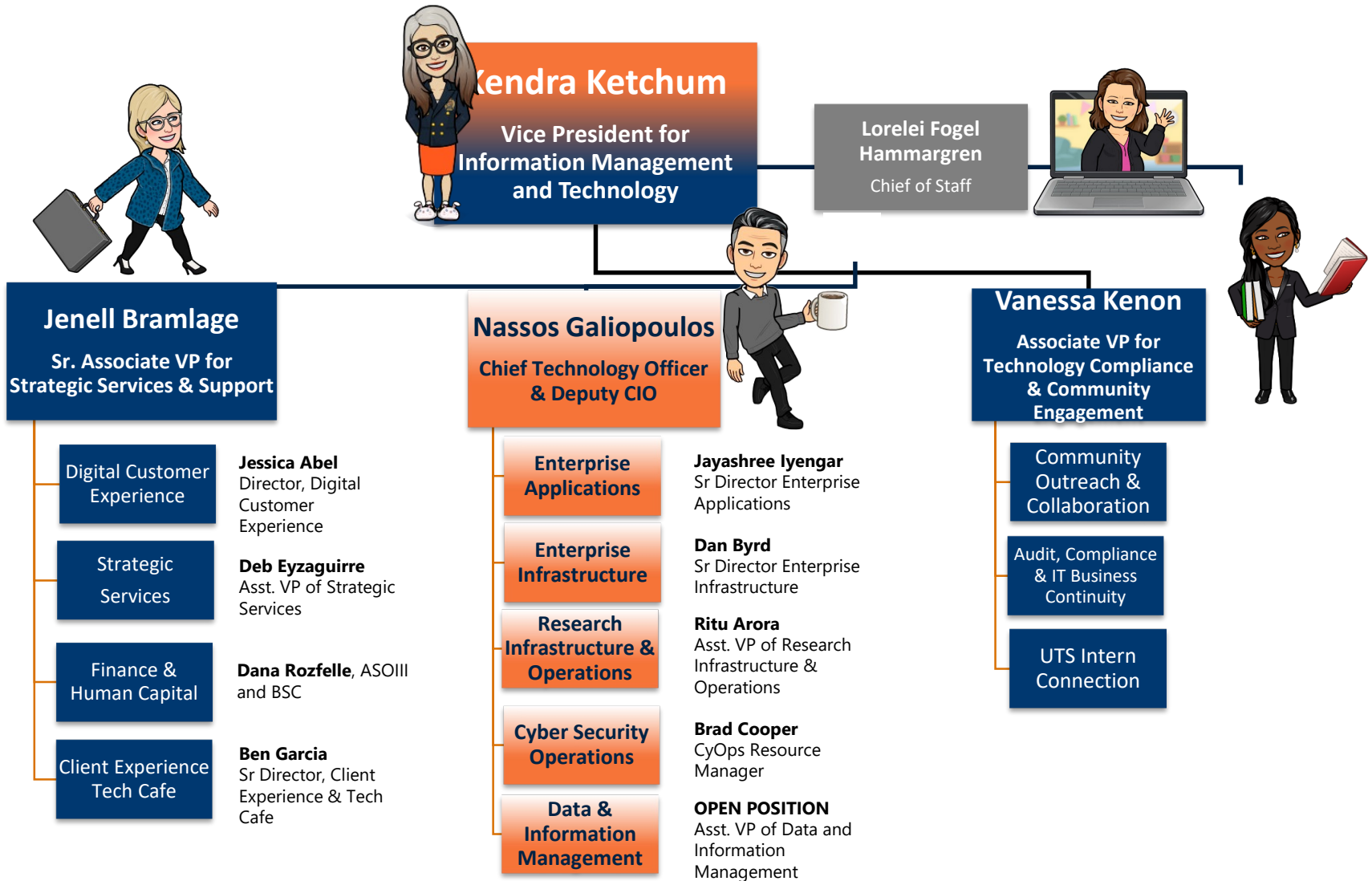### Cloud Collaboration Services
Teams, SharePoint, email, OneDrive

Enterprise Resource Planners
PeopleSoft, Cognos, process mapping

Student ERP

Campus Organizational Memberships
TASSCC, LEARN, Educause, Gartner

Data Center
Virtual server environments for hosting software platforms, apps, etc.

Physical locations at JPL, Frio

Campus Support
Tools needed to be accessible to campus stakeholders and provide support

Compliance and training

Community Relations

Tech Solutions Business Operations
BSC

Financial management

HR support for department

Professional development

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Kendra Ketchum

Vice President for Information Management and Technology

Lorelei Fogel Hammargren

Chief of Staff

Jenell Bramlage

Sr. Associate VP for Strategic Services & Support

Nassos Galiopoulos

Chief Technology Officer & Deputy CIO

Vanessa Kenon

Associate VP for Technology Compliance & Community Engagement

Digital Customer Experience	**Jessica Abel** Director, Digital Customer Experience	
Strategic Services	**Deb Eyzaguirre** Asst. VP of Strategic Services	
Finance & Human Capital	**Dana Rozfelle**, ASOIII and BSC	
Client Experience Tech Cafe	**Ben Garcia** Sr Director, Client Experience & Tech Cafe	

Enterprise Applications	**Jayashree Iyengar** Sr Director Enterprise Applications
Enterprise Infrastructure	**Dan Byrd** Sr Director Enterprise Infrastructure
Research Infrastructure & Operations	**Ritu Arora** Asst. VP of Research Infrastructure & Operations
Cyber Security Operations	**Brad Cooper** CyOps Resource Manager
Data & Information Management	**OPEN POSITION** Asst. VP of Data and Information Management

Community Outreach & Collaboration

Audit, Compliance & IT Business Continuity

UTS Intern Connection

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Cyber Security

- Support moved to 24/7 in SOC so additional staff needed to support increase in hours

DevOps

- Automation and workflow processes
- Sr. DevOps Engineers (2)
- Infrastructure, Network, Cloud engineers needed
- Some positions to be reclassed, some new

Data Information, Warehouse, Governance

- Position need to assist in standing up new area

IT Capital Projects

- Additional resources needed to support new capital projects and IT-related needs

Capacity Management

- Additional position needed to monitor and oversee capacity management in conjunction with Strategic Services and ServiceNow

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VP Information Management and Technology - Current Year Position Dollars by Fund												
Dollars by Fund	E&G and Designated Tuition		Other Designated (Fees, Sales & Service, Official Occasions, etc.)		Auxiliary Sales and Services and Fees		Restricted Gifts and Endowment Earnings		Total	
	Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant
Original Budgeted Positions by Funding										
Classified	$ 1,198,019	$ -	$ 7,194,790	$ 379,275	$ -	$ -	$ -	$ -	$ 8,392,809	$ 379,275
A&P	$ 248,636	$ 85,284	$ 1,626,155	$ 90,060	$ -	$ -	$ -	$ -	$ 1,874,791	$ 175,344
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Unbudgeted Positions (Funded from Year-to-Year with one-time funding)										
Classified	$ 66,000		$ 646,998						$ 712,998	$ -
A&P			$ 233,850						$ 233,850	$ -
Total FTE Unbudgeted	$ 66,000	$ -	$ 880,848	$ -	$ -	$ -	$ -	$ -	$ 946,848	$ -
Original Budgeted Positions not to be Filled								$ 195,400	$ 751,448	

There were 3 positions budgeted and not filled for a total of $195,400.

Funding for unbudgeted positions will be transitioned to permanent funding in future years through the increase in the technology student fee and reallocation of salary funds as staff resign and retire.

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VP Information Management and Technology - Current Year Projections					
	E&G and Designated Tuition	Other Designated (Fees, Sales & Service, Official Occasions, etc.)	Auxiliary Sales and Services and Fees	Restricted Gifts and Endowment Earnings	Total
IRM Original Budget	$ 2,340,746	$ 21,166,640	$ -	$ 23,586	$ 23,530,972
Permanent Budget Adjustments	$ -	$ -	$ -	$ -	$ -
Adjusted Permanent Budget	$ 2,340,746	$ 21,166,640	$ -	$ 23,586	$ 23,530,972
% Budget by Fund	9.9%	90.0%	0.0%	0.1%	
Permanent Uses					$ -
Balance Remaining for Strategic Uses	$ 2,340,746	$ 21,166,640	$ -	$ 23,586	$ 23,530,972

Note: Over 95% of permanent E&G and Designated Tuition funds are used for staff payroll expenses.

Currently the department does not have any reserves. Prior to 2020 the department did carry reserves, but those funds were used as part of budget reductions.

Sources Include:
- Mandatory Fees from UTS
- Allocations of Student Services Fee
- Estimate for F&A Income Projected in Original Budget
- Estimate for Gift Income Projected in Original Budget

LANDSCAPE ASSESSMENT

Challenges & Opportunities

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Telecommunications Funding
- Lines cancelling equals less revenue
- Expenses remain relatively constant and no source for meeting shortfall

Cyber Security
- Heightened need to protect data and cyber threats
- Support needed for SDS, NSCC, Cyber Security program

Network Modernization
- Technical debt of over 12 years
- Urgent need to update network infrastructure

Capacity Management and Staffing Needs
- Lower salaries at UTSA and increased job availability with other employers lead to staff resignations
- Need skilled staff to support university initiatives

Funding Based on Enrollment
- Tech Solutions over 90% funded by student technology fee
- As enrollment decreases, revenue decreases

Process Automation and Workflow
- Too many processes have not been implemented end-to-end and across business functions
- Creates inefficient services and delays in problem resolution

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Service-based costing model based on consumption of services.

Review core funding for long-term commitment items.

FTE allocation of IT-related costs to other departments

Loan opportunities for long-term lifecycle replacement (LCR) in excess of $5M

Utilize new life cycle replacement model to capture and identify aging technology for one-time capital expenditures

Continued portfolio governance alignment with SIF prevent financial sprawl

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Expense	Description
$ 957,000.00	Presidio payment (last payment for PBX project)
$ 1,623,090.99	All payroll and M&O
$ 23,602.88	Shortfall in RC0002 from FY21
$ 2,603,693.87	**Total Estimated Expenses for FY22**
$ 1,111,500.00	Anticipated Revenue for FY22 (3900 lines x $285)
$ (1,492,193.87)	**Shortfall for FY22**
$ 667.61	Line charge that would have been needed to cover estimated expenses in FY22

Line charge of almost $600 needed for FY23 to cover estimated expenses.

This is the only cost center that is cost recovery for Tech Solutions. (RC0002)

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Expense Description (Annual)	Anticipated Expense Amount
Salaries and Benefits 4 FT Telecom staff and 1 PT Telecom staff 75% of salaries from networking staff for 7 FT staff	$973,533.19
Phone and AT&T bills	$574,390.75
Internet and Related Costs	$216,365.00
Business Operations Expenses (van, fuel, office supplies, cells)	$16,151.76
Alert Systems	$25,000
Depreciation of System	$183,500
Maintenance	$141,000
Managed Services from Presidio	$50,000
Training for CNCT Staff	$15,000
Total	**$2,194,940.70**
Anticipated Revenue (3700 lines X $285 per line)	$1,054,500.00
FY23 Anticipated Shortfall	- **$1,135,440.70**

Would need line charge of almost $600 per line in FY23 to cover expenses.

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Fiscal Year	Expense Description	Annual Expense
FY23 (annual)	Palo Alto Maintenance (firewall hardware for 3 appliances), previous contract on other appliances expires in FY25 and price will double for all 6 appliances, XSOAR	$430,000 annually $2M for FY25 for new appliances *LCR*
FY23 (annual)	Red Hat EL Ansible & Licensing (Red Hat Enterprise Licensing) Linux OS Software	$350,000 annually
FY23 (annual)	Extra Hop (Cyber Security to monitor network traffic)	$300,000 annually
FY23 (annual)	Ellucian Experience (first year funded by SIF, but no plans for funding moving forward)	$250,000 annually
FY23 (annual)	ServiceNow (parts funded by SIF), assumes no additional licensing or products added to current contracts	$700,000 (estimated after current contracts expire)
FY23 (annual)	Network modernization	~ $2M (if $8M investment up front, $2M annually after 5 yrs)
FY24 (annual)	Microsoft A5 expense moving from system to each campus	$1.2M (estimated, annual)
FY24 (multi-year contract)	Infoblox licensing (physical and virtual, hardware in future)	$1M (3 yr contract)
FY25 (annual)	ACIRP maintenance and licenses, does not include ARC	$3M annually (unless another deal is negotiated)
FY25 (multi-year contract)	Forescout (to replace Clear Pass, paid w/ HEERF in FY22, 3-yr contract)	$1.1M (3 yr contract)
FY26 (annual)	VDI2 maintenance and licenses VMWare	$2M annually

SURVEY RESULTS

Feedback from Stakeholders

How did we do?

👍 👎

If you believe your Request was not fulfilled successfully, please click "Open in Service Portal" below then select "Request Not Completed".

Sept 2020 – present

ServiceNow ticket closure feedback options.
A "thumbs down" opens another textbox for additional feedback

1218 returned responses

1127 "thumbs up"

92.53% satisfaction

Are there university-related mission items that your area is struggling to successfully meet due to IT-related issues? If so, describe the items and the IT-related needs.	- Imaging and reimaging computers is taking a month. This severely limits productivity of new employees. - Data access; the creation of accountability dashboards; prospect research; capturing engagement; event logistics solutions; enabling Venmo/PayPal/etc. for donations - Bringing our faculty/staff emails into Salesforce/MarketingCloud and uniting with our student email platform will streamline our processes, improve consistency, and build bench depth of personnel who have the training to be able to send broadcast emails. - Yes, related to student success electronic petition processing and other items related undergraduate studies. - Project related - We have challenges sending email messages to specific populations. A recent example is the one-time compensation email. We were not able to secure an email distribution list without student employees in a timely manner. In addition, Risk and Emergency Management manages several servers for business continuity, Giant Voice, and other technical systems. We struggle with having different Tech Café IT associates or other representatives for each project, and would benefit from an assigned set of contacts, i.e. OREM IT service team, for continuity and efficiency. - The duration to provide PeopleSoft data and reports has increased significantly. Most of this is various reports and queries needed to handle day to day or project work that surfaces. - The employee service team members have daily challenges with Cisco Finesse and Jabber. We have team members that have to re-start their computer daily to get Jabber to work. The disruption could be 10 minutes up to 30 minutes. Overall it is not a refined or robust system to meet day to day operational needs and finding a robust call center system or reduce the disruption. - There are not large items but there are sometimes issues with normal Tech Café tickets not being resolved quickly and that can hinder our back-office operations. I have just recently reached out to Nassos about creating an escalation process for our back-office service ticket issues.
What IT-related infrastructure or software would assist your unit in better meeting the mission and strategic initiatives?	- Enhancements (i.e., increased functionality and reporting) to UTS-supported existing applications in a timely manner, such as the COI disclosure module. This is not due to the quality/knowledge of staff but an insufficient number of staff when compared to demands for their time. - Tableau (for dashboards). Greg Cortez would be the better person to answer this question. - Adding a Marketing Cloud business unit for faculty/staff emails is already part of UTSA's newly negotiated contract with Salesforce. In order to set up this new business unit, we are hoping that UTS can dedicate resources to help us accomplish the data integrations (see next question). - It is utilizing software that we already have but configuring for these processes. In addition, have purchased new software for core curriculum assessment that needs incorporation with our LMS to advance these processes. - We would benefit from access to constant contact for email communications, as well as a social media management tool such as Hootsuite or another product. Ideally, an enterprise license for constant contact or salesforce marketing cloud to allow for easier and better management of emails. - People Excellence currently uses a lot of Excel documents to track our work and metrics because not everything is captured in PeopleSoft; this is especially true in the talent acquisition Management System. - Finding a UTSA supported scheduling application for scheduling appointments. We currently use Doodle not user friendly. - Management Reporting and Data Warehouse are desperately needed. The Budget to Actual report is high priority and needs a focused communication push to leaders on campus.

Are there software integrations that would assist your department in connecting current software applications that you use to Banner or PeopleSoft?

- Yes! We are hoping for the following:
  - Write a script to pull faculty/staff data from Peoplesoft, and schedule the job to nightly feed into the dedicated Marketing Cloud SFTP that is already set up
  - Update a script that currently pulls all student data and have it also funnel nightly into Marketing Cloud SFTP
  - There is a limitation to the default reply mail management within Marketing Cloud. UTS would need to help find a solution for when replies are sent directly to the subdomain e.utsa.edu which has been delegated to the Marketing Cloud platform by the UTS Networking Infrastructure team. Solution was identified by the University of Alabama where outlook exchange listens for email sent to that domain and routes it to an internal mailbox.
  - Currently, there is MFA, but it's not connected to UTSA SSO. With more users, we would want to set up easier login authentication similar to CRM
- Allowing UTSA retirees to continue with SSO
- Significant FA systems are already integrated to PS or Banner. I can't think of any systems that aren't at this time

What suggestions do you have for improvements to IT-related processes or workflows where Tech Solutions could help to make the processes/workflows more efficient and effective?

- Mature research data center operations, with increased visibility and customer-service orientation. Expanded services provided by information security. UTSA's risk mitigation relies heavily on them and they are a tiny number of staff.
- Prioritization of projects and understanding how projects fit into meeting the mission and strategic initiatives of the institution. Reviewing how the number of projects completed each year could be increased.
- We will identify these in our workshop.   Predefined standards and cost estimating will be a critical component.
- We suggest an easy and automated way to request and receive specific lists for email distribution.
- Offering Workflow and Onboarding Workflow would be helpful. Right now, in Talent Acquisitions, they manually create offer letters in word and upload into DocuSign for signatures then email the offer letter out. There is no way to track how long work effort takes so it is tracked in an excel spreadsheet. / Prepopulating data from the requisition details into the offer letter and eForms would be helpful to maximize data integrity and minimize errors. / Having the ability to send survey emails to hiring managers when we fill a position and create trend reports; right now, they are manually sent emails to each manager every week ePerformance enhancements which I think are really important and Talent Management has shared / A potential flag or marker in PeopleSoft to help flag eligibility or potential items to review if possible / An easy way to develop and send surveys out to employees/leaders when/if needed / The new hire experience with log in issues with PeopleSoft.
- Establish escalation process for back office operational needs, as noted above. I know I can go to Nassos as needed, but I will not do that unless absolutely necessary. There should be a process whereby one of my Directors could go to Tech Café supervisors, then an Asst VP to Ben, me to Nassos, etc.

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What are three initiatives for your unit where Tech Solutions could help to create a digital transformation?	• Maturity of the research data center operations and services. • Data dashboard of data sitting in siloed departments to improve decision making related to security. • Improved functionality for the COI disclosure system (esp. reporting). • Dashboards; Recurring payment options; event software for ease of consumer and capturing engagement • The transition of faculty/staff emails to Marketing Cloud is our most pressing need. • Student Petitions and Core Curriculum • Email management/distribution and social media management – overall, focused on how we can increase the speed and efficiency through which we can interact and respond to clients. • Management reporting, Position Management System, implement planning system to manage IRM Model
Are there reports that could be created that would provide necessary data to improve decision making that you currently don't have access to?	• Cost estimates and historical data, tech standards for new buildings and installs. • Information on available queries in PS that can be used by our Business Service Center. A lot of the queries they currently use have been passed down by former employees. There are probably a lot more queries that they don't even know exist. / Accurate and dynamic email distribution lists for use not only by our Strategic Communications team but also by our Emergency Management Team. • Currently when it comes to hiring new employees, there is no report to show how long effort takes from when the position needed is requested through when the person starts work with us. Today we are using 8 different spreadsheets to track the work. / HRBP team members need to have RPT access and training on how to pull reports that can help enable them to be better business partners and drive the business forward. If they are able to have reporting, that will enable them to do trending analysis, and help leaders solve issues/do proactive planning; turnover is a big one. / Offering PeopleSoft query training for People Excellence back office employees. • Budget to Actual Report – at different levels • Multi-year budget/actual history report • Easy position budget reports (not possible now without position mgmt. system)
What is/are the most important technology initiatives that we could help move UTSA forward for success?	• 1.Information security, including outreach, training, direct support, automated backups for research data, and more direct requirements/training for research data storage. 2. Ensure adequate storage capabilities for research data storage over time, especially to comply with federal requirements for open access. • Creating a more seamless integration to banner would improve data connection and communication. • Initiatives focused on automating and streamlining processes so that staff spend less time on manual or quick fixes so that more time can be spent on reaching university strategic initiatives and implement new ideas. • Beyond the division of Business Affairs, the entire UTSA campus can benefit from a better way to manage divisional and campus wide emails, including streamlined and dynamic distribution lists that we can customize in order to get the relevant information to the correct people. • Consolidate HCM Modules/Platforms in HR. To look up someone's employment history, we currently have to look in 3-4 systems to gather information for one person. One source of record for employment records would make us more efficient, effective, create bandwidth, and reduce errors because one system does not talk to another. / Additional MyTraining support; currently our LMS system manager is often times overwhelmed with other initiatives. • Reporting and data warehouse – we're automated in all major business processes but still have no reporting beyond queries.

Appendix Detail

The following slides provide more detail on some metrics used for LinkedIn Learning, annual assessment report and responses to the Huron assessment findings from 2018.

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LinkedIn Learning content highlights (Jan 1, 2021 - Dec 31, 2021) ⓘ

14,080	3,635	122,539	109,400
LinkedIn Learning course views	LinkedIn Learning course completions	LinkedIn Learning videos viewed	LinkedIn Learning video completions

Course views   Day · Week · **Month**

Course completions   Day · Week · **Month**

Impact of LinkedIn

Are learners logging into the platform?

4,661
Unique Users Logging Since Launch

17%
Monthly % Learners Logging In

Monthly % Logging In
- 75th Percentile
- Median
- 25th Percentile

100%

50%

0%

Feb 20 · Apr 20 · Jun 20 · Aug 20 · Oct 20 · Dec 20 · Feb 21 · Apr 21 · Jun 21 · Aug 21 · Oct 21 · Dec 21
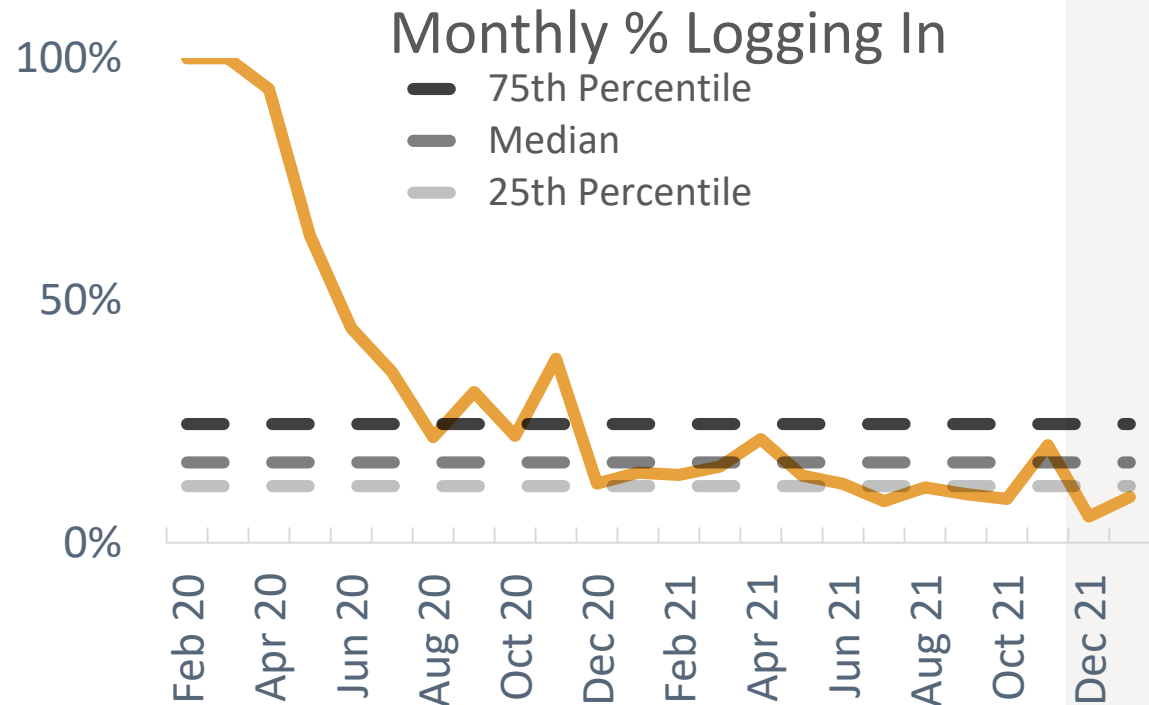
% Logging in is Unique Users divided by Max Activated Seats

Linkedin Learning

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2 Impact of LinkedIn

How many hours are they learning?

10,430
Total Hours
Since Launch

1.0
Monthly
Hours/Learner

Monthly Hours per Learner
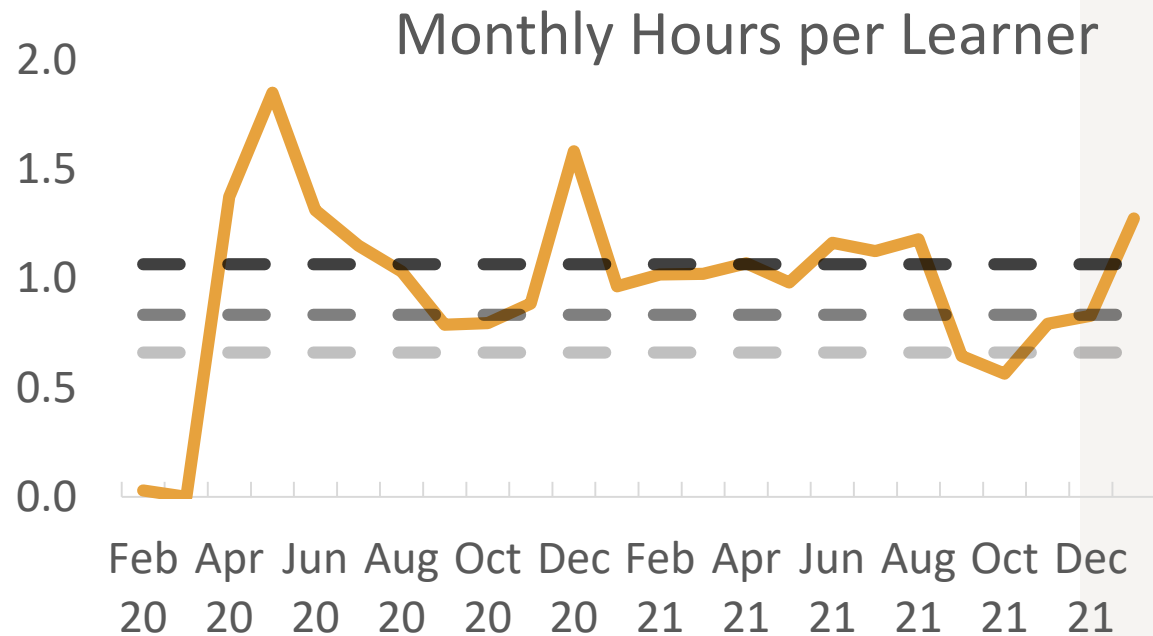
Hours watched during month divided by # Unique User
Note: in-product reporting shows hours/viewer instead of hours/logged-in-user shown here

Linked in Learning

Client Experience and Solutions - Faculty and staff will receive timely response and assistance to their request for assistance with personal computer issues.
Outcome Status: Active
Start Date: 09/01/2006

Average Speed of Answer
Minimum Criterion for Success: Answers all incoming telephone calls within 30 seconds.
: Collected: Monthly
Analyzed: Annually

Reporting Period: 2020-2021
Outcome: Acceptable
Annual result: 29 seconds Average Speed of Answer. Review period 9/1/2020 through 8/31/2021 (exclusion of Dec. '20 and Jan. '21 due to enforced university wide password change effort).
(12/13/2021)

Action: Months of Dec. '20 and Jan.'21 call volume produced high call volume that exceeded capacity of existing UTS Call Center resources for handling of inbound call traffic. This was a result of a department university-wide password reset initiative. Due to the known impact this initiative would have, Dec. and Jan volumes are excluded from operational performance metrics.

As a result of the Dec./Jan. initiative and potential for such future actions, we now have a blueprint for exception instances of extreme inbound traffic where 3rd party managed services can be called upon for assistance to augment our support services. (12/13/2021)

Average Abandoned Percentage
Minimum Criterion for Success: Ensure 95% of all telephone calls are answered.
: Collected: Monthly
Analyzed: Annually

Reporting Period: 2020-2021
Outcome: Acceptable
Annual result: 5% Average Abandoned Percentage. Review period 9/1/2020 through 8/31/2021 (exclusion of Dec. '20 and Jan. '21 due to enforced university wide password change effort),
(12/13/2021)

Action: Months of Dec. '20 and Jan.'21 call volume produced high call volume that exceeded capacity of existing UTS Call Center resources for handling of inbound call traffic. This was a result of a department university-wide password reset initiative. Due to the known impact this initiative would have, Dec. and Jan volumes are excluded from operational performance metrics.

As a result of the Dec./Jan. initiative and potential for such future actions, we now have a blueprint for exception instances of extreme inbound traffic where 3rd party managed services can be called upon for assistance to augment our support services. (12/13/2021)

Total Calls Abandoned
Minimum Criterion for Success:
Track total calls abandoned. Show year to year trend improvement.
: Annual

Reporting Period: 2020-2021
Outcome: Acceptable
Annual result: 1,532 calls abandoned out of 26,816 Total calls received.
Review period 9/1/2020 through 8/31/2021 (exclusion of Dec. '20 and Jan. '21 due to enforced university wide password change effort).
(12/13/2021)

Action: Months of Dec. '20 and Jan.'21 call volume produced high call volume that exceeded capacity of existing UTS Call Center resources for handling of inbound call traffic. This was a result of a department university-wide password reset initiative. Due to the known impact this initiative would have, Dec. and Jan volumes are excluded from operational performance metrics.

As a result of the Dec./Jan. initiative and potential for such future actions, we now have a blueprint for exception instances of extreme inbound traffic where 3rd party managed services can be called upon for assistance to augment our support services
(12/13/2021)

Fall and Spring - As service owner for Tech Solutions, evaluate the overall Service Now ticket remediation

Minimum Criterion for Success: Evaluation all incoming tickets, remediation time, ticket SLA and breaching, and ensure that 90% of tickets are handling within SLA standards.

Reporting Period: 2020-2021
Outcome: Acceptable
Annual Result for meeting SLA standards: 67% of all incidents met SLA standard.

Total Incidents: 72,089
Total Incidents meeting SLA: 48,393
(12/13/2021)

Action: For review period 9/1/20 through 8/31/21, the overall SLA percentage metric (67%) represents all incidents captured between the review period to include both Tech Solutions (Central IT) and UTSA Distributed IT support group incident performances.

ServiceNow was implemented in August 2020 and is being utilized and its incident management services are continuously being expanded to more distributed IT organizations at UTSA. Further enhancements for SLA threshold notifications and reporting are being development in the next review period for organization awareness and to assist in our identification of any workflow process improvements needed.

Tech Solutions Tech Café branded front-line support performed at a 69% Meet SLA standard.
(12/13/2021)

Research Computing - Ensuring that all support and services needed to implement and maintain the high performance computing area are in place and allowing clients to successful utilize the services provided.
Outcome Status: Active
Outcome Type: Operational
Start Date: 09/01/2020

Fall and Spring - Review of Service Now tickets for Research Computing.
Minimum Criterion for Success: Number of tickets received and successfully addressed for the FY, as well as any improvements made to processes based on ticket analysis. Evaluation all incoming tickets, remediation time, ticket SLA and breaching, and ensure that 90% of tickets are handling within SLA standards.

Reporting Period: 2020-2021
Outcome: Acceptable
437 incidents and support tasks received

64 breached SLA (~14.6%)
(12/13/2021)

Action: Most of our catalog items for service requests were created as incidents in Service Now, but they are technically not incidents. We are working with the Service Now team to convert the catalog items from incidents to service requests. Since the SLAs for incidents is shorter than service requests, this will improve our rate of completing requests with the SLAs. (12/13/2021)

Fall and Spring - Utilization of research computing services.
Minimum Criterion for Success: Collecting and evaluation total number of researchers assisted, as well as utilization metrics for ARC.
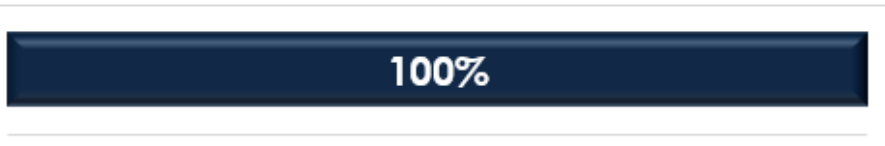
Reporting Period: 2020-2021
Outcome: Acceptable
2965 compute jobs were submitted on Arc between the production date of 7/13/21 and the and of the fiscal year – 8/31/21

39,958 compute jobs were submitted on Shamu during the entire fiscal year 2020-2021
(12/13/2021)

Action: Arc was only in production for ~6 weeks during the previous fiscal year. We will continue to advertise and communicate the new system throughout the current fiscal year.

Through ongoing communication campaigns, and the decommissioning of Shamu, we expect usage to increase to the level of Shamu, and possibly higher.
(12/13/2021)

Technology Solutions

UTS PROGRESS TOWARDS VPIMT 2019 INITIATIVES
from the Office of the Vice President for Information Management and Technology

Projects and initiatives:	Progress towards completion:
Implement Cisco-backed technology to help improve collaboration and simplify communication within faculty, students and staff population	100%
Establish an enterprise service management practice with ServiceNow	100%
Establish Tech Café to improve student, faculty and staff experience and increase adoption of available technologies	100%
Strengthen the network architecture	50%
Establish operations management practice (Infoblox)	100%

Establish a security operations practice (SEIM)	95%
Migrate students to Office365 from Google Cloud to provide advanced threat protection and data loss	80%
Engage in workforce and professional develop opportunities for the staff of UTS	100%

Progress completion rate as of September 2020 → 70.0%

Progress completion rate as of September 2021 → 90.6%

(Details can be found at the end of this document for what work is still outstanding and a plan for when it will be completed.)

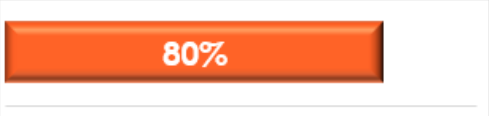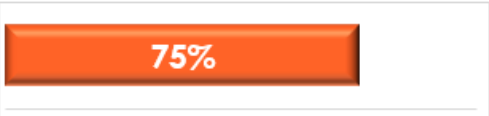# UTS PROGRESS TOWARDS HURON REPORT RECOMMENDATIONS
from the Office of the Vice President for Information Management and Technology
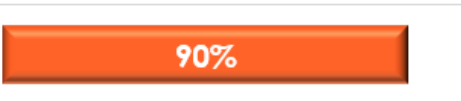
Relative Level of Institutional Impact	Clear Winners **High Impact | Low Complexity** *Completion Percentage:* Oct 2019 → 67.0% Sept 2020 → 86.5% Sept 2021 → 94.0%	Transformational Programs **High Impact | High Complexity** *Completion Percentage:* Oct 2019 → 52.0% Sept 2020 → 85.5% Sept 2021 → 86.0%
	Quick Wins **Low Impact | Low Complexity** *Completion Percentage:* Oct 2019 → 93.3% Sept 2020 → 95.0% Sept 2021 → 97.0%	Investments for Incremental Value **Low Impact | High Complexity** *Completion Percentage:* Oct 2019 → 56.7% Sept 2020 → 85.0% Sept 2021 → 93.0%
	Implementation Complexity	
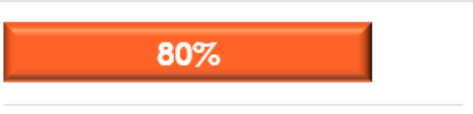
COMPLETION TIMELINES
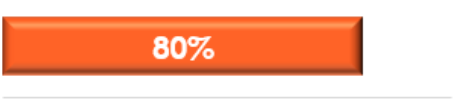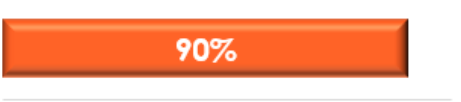### from the Office of the Vice President for Information Management and Technology

Dept 2019/20 Projects and initiatives:	Project Detail:	Progress towards completion:	Completion Timelines:
Strengthen the network architecture **DB**		50%	**Date TBD** Currently evaluating network hardware upgrade solutions. Pending funding for execution.
Establish a security operations practice (SOAR) **BC**		95%	**11/30/2021** Working on first integration (use case).
Migrate students to Office365 **DB**		80%	**10/2021** Migration date **12/31/2021** Full cleanup of the legacy environment
Quick Wins (low institutional impace and low implementation complexity)			
Huron recommendations:	**Huron Recommendation Detail:**	**Progress towards completion:**	**Completion Timelines:**
Software Rationalization **BG**	Rationalize software purchasing across the institution in order to better leverage the institution's buying power and provide greater availability to all users	90%	**12/31/2021** New director will inventory enterprise software, create software asset mgmt policy/process. Endpoint mgmt implement software standard configuration, and make available software on software centers, and streamline ordering of software through ServiceNow.

Clear Winners
(high insitutional impact and low implementation complexity)

Huron Recommendations:	Huron Recommendation Detail:	Progress towards completion:	Completion Timelines:
Consolidate Commodity Services BG	Consolidate commodity services to reduce duplication of efforts and spending as well as managing risk and enhancing the quality of service delivery (e.g. data center, server data management, DR, security, SLA, etc.)	80%	**10/1/2021** Tech Café Franchise implementations – REDKE and Research Computing **12/31/2021** Reduce duplicated service catalog offerings, streamline workflows and automation, and improve service response.
Tier 2 ITA Support BG	Establish a more direct Tier 2 support function for ITAs.	70%	**10/1/2021** Tech Café Franchise implementations – REDKE and Research Computing **Pending 8/31/2022** COEHD, COB, UTSA Libraries
Business Process Automation DE/NG	Establish more rigorous business analysis and relation management disciplines to capture and enhance implementation of forms for data capture and business process workflows.	75%	**10/31/2021** The complete financial component will include a 1 way data feed from PeopleSoft.
Infrastructure Upgrades DB	Plan and execute necessary network and telecommunication upgrades; continue discussions with service providers and consider other service needs such as DAS; review options of centralizing ownership of telecommunications and unifying end user communication experiences across campus.	60%	**Date TBD** Next phase will involve network hardware upgrades – currently evaluating solutions. Will be pending funding for execution.

Development and Release Management JI/NG	Evaluate development and release processes to streamline deployment of new functionality into production. Formalize and establish more rigorous QA and testing.	60%	3/1/2022 Integrate with Release Management features in Servicenow

Investments for Incremental Value
(low institutional impact and high implementation complexity)

Huron Recommendations:	Huron Recommendation Detail:	Progress towards completion:	Completion Timelines:
IT Monitoring BC	Inventory and rationalize the use of IT network monitoring tools and develop a strategy across the institution on operations	85%	12/30/2021 Identifying additional tools for monitoring
Graduate Admissions JI	Review usage of decision desk with integration points to Banner and SalesForce. Identify opportunities to automate processes and evaluate usage for campus-wide deployment.	80%	12/31/2021 Implementing Unicas Liasion, graduate admissions which is replacing Embark and a lot of processes are being changed and automated as part of this initiative.
IT Budget Review JB	Re-evaluate UTSA's current IT budget and determine IT funding levels to serve the needs of the institution and meet UTSA blueprint goals.	90%	12/31/2022 Plans for outstanding budget needs identified and applied to strategic plan financial needs for FY23 *Much of the process for funding allocation rests outside of the department

Transformational Programs
(high institutional impact and high implementation complexity)

Huron Recommendations:	Huron Recommendation Detail:	Progress towards completion:	Completion Timelines:
IT Funding Level JB	In light of the comparatively low funding levels for OIT, we recommend a re-evaluation of UTSA's overall IT budget to determine funding levels commensurate with requirements	90%	9/20/2021 Submit increase for tech solutions fee to students *Much of the process for funding allocation rests outside of the department

	to serve the current needs of the institution and meet Blueprint UTSA goals.		
Research Computing Strategy **RA**	Develop a research computing service strategy with a defined tiered service model, skillsets, to address the needs and demands of the institution as it moves to a Tier 1 Research Institution.	**80%**	**8/31/2022** Increase staff, training and infrastructure, and building tier 3 support, increase connectivity to TACC
IT Funding Model **JB**	Reevaluate the existing student fee based on funding model and create a transparent model that provides the flexibility to allocate funds as needed to meet UTSA blueprint goals.	**50%**	**12/1/2021** Ongoing conversations about funding sources outside of student technology fee are still occuring. Fee was increased and another increase is being planned. *Much of the process for funding allocation rests outside of the department
Enterprise Architecture Strategy and Roadmap **DB/JB**	Establish enterprise architecture strategy and roadmap to guide and coordinate IT projects across UTSA.	**90%**	**10/2021** Addition of Asst VP for Strategic Services to align projects and capacity with BRMs, PMs, BAs.
IT Asset Management **DE/JB**	Optimize hardware and software asset inventory and procurement practices across the institution, providing coordination of IT assets from acquisition through disposal.	**55%**	**2/1/2022** purchase and license the application from ServicNow. **6/1/2022** Implementation should be complete.
Workforce and professional develop opportunities **JB**	Review existing staff compensation, staffing, career development and training models and align them in industry best practices.	**90%**	**12/31/2021** PeopleExcellence Market calibration **8/31/2022** Final plan for org structure, compensation and staff changes, and skill and career development needed
Data Governance	Establish a master data management strategy governing data across the enterprise		This is currently part of Academic Affairs and institutional research

Items at 100% completion:

Huron Recommendations:	Huron Recommendation Detail:
OIT Consulting Services (Quick Win)	Establish a consulting practice in conjunction with ITAs from the distributed units to rovide expertise to address unique needs; Evaluate options for IT be included in general onboarding sessions for Faculty, Staff and Students to provide clarity in IT offerings across the campus. Evaluate current tools and capabilities in creating and communicating a One Stop Shop for IT concerns
IT Communications (Quick Win)	Establish clear communication lines with defined escalation pathways in order to lower implementation costs of projects
IT Security Testing (Clear Winners)	Have 3rd party vendors conduct vulnerability scanning, penetration testing, control reviews on a quarterly basis. Review and implement security best practices such as TACC 202, NIST, ISO 27002 on an annual basis to maintain federal compliance and proactively address security issues
Business Analysis (Clear Winners)	Inventory and review all core business processes across the institution to determine their relevance to the ongoing mission of the institution and how it supports its needs
IT BRM Role (Clear Winners)	Define IT business relationship manager role to increase collaboration, communication, IT service reporting, planning and project integration between units
Organizational Development (Clear Winners)	Review existing staff compensation, staffing, career development and training models and align them to industry best practices
Apple Support (Clear Winners)	Establish Apple specialization to support standardized Apple builds and products, guidelines to be determined and published by OIT, across the campus
Organization Model (Investments for Incremental Value)	Review current reporting structures within the organization to more efficiently capitalize on management experience.
ITSM Tools (Investments for Incremental Value)	Evaluate current service desk solution and determine fit across enterprise needs (e.g. reporting, event tracking, CMDB, asset invenory, process workflows)
IT Security Management (Investments for Incremental Value)	Define and deploy information security management programs and frameworks (e.g. IT Security Policy Framework, Decision Authority Rights)
IT Governance Model (Transformational Programs)	Establish governance model / framework with clearly defined committees, membership and decision rights and escalation paths to prioritize IT initiatives and manage demand
Portfolio and Demand Management Methodology (Transformational Programs)	Establish a consistent portfolio and demand management methodology to define, prioritize, evaluate, monitor and communicate OIT's project portfolio to campus stakeholders
Capacity Management (Transformational Programs)	Develop a methodology and strategy around managing and tracking capacity; system evaluation and deployment may be required to sustain growth to Tier 1 institution.
ITSM Processes (Transformational Programs)	Evaluate and establish ITSM processes to align IT operations across the institution with industry best practices.

Quick Wins:

- OIT (now UTS) Consulting Services
- IT Communications
- Software Rationalization

Clear Winners:

- IT Security Testing
- Tier 2 ITA Support
- Consolidate Commodity Services
- Business Analysis
- IT Business Relationship Manager Role
- Business Process Automation
- Organizational Development
- Infrastructure Upgrades
- Development and Release Management
- Apple Support

Transformational Programs:

- Capacity Management
- IT Governance Model and Processes
- Data Governance
- Research Computing Strategy
- IT Funding Model
- Portfolio and Demand Management Methodology
- Enterprise Architecture Strategy and Roadmap
- IT Strategic Plan Development
- ITSM Processes
- IT Asset Management

Investments for Incremental Value:

- Organizational Model
- IT Monitoring
- ITSM Tools
- IT Security Management
- Graduate Admissions
- IT Budget Review

Kendra Ketchum
Vice President for Information Management and Technology

Summary TSF & Other Funding

5 Year Financial Proforma
As of October 31, 2021

	FY 2020 Actuals	FY 2021 Actuals	FY 2022 IRM Statement	FY 2022 Original Budget	Budget Adjustments	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection	Assumptions
REVENUES														**RC0002 Data Not Included**
Student Fee and Other Revenue Sources														
Student Fees - Mandatory	19,634,021	21,707,168	20,644,740	23,065,500	(464,600)	22,600,900	22,600,900	-	22,600,900	22,600,000	28,500,000	28,500,000	28,500,000	
Student Fees - Non-Mandatory	-	-	-	-	-	-	-	-	-	-	-	-	-	
(A) **Total Fees**	$ 19,634,021	$ 21,707,168	$ 20,644,740	$ 23,065,500	$ (464,600)	$ 22,600,900	$ 22,600,900	$ -	$ 22,600,900	$ 22,600,000	$ 28,500,000	$ 28,500,000	$ 28,500,000	
Sales & Services	99,108	45,370	30,400	-	-	-	-	-	-	32,600	32,600	32,600	32,600	
Other Revenue - Explain	1,088,167	2,734,216	927,719	2,734,015	-	2,734,015	2,734,015	-	2,734,015	2,800,000	2,800,000	2,800,000	2,800,000	
(B) **Total Other Revenue**	$ 1,187,275	$ 2,779,586	$ 958,119	$ 2,734,015	$ -	$ 2,734,015	$ 2,734,015	$ -	$ 2,734,015	$ 2,832,600	$ 2,832,600	$ 2,832,600	$ 2,832,600	
(C) **Total Revenue before Strategic Investment Fund Participation (A+B)**	$ 20,821,296	$ 24,486,754	$ 21,602,859	$ 25,799,515	$ (464,600)	$ 25,334,915	$ 25,334,915	$ -	$ 25,334,915	$ 25,432,600	$ 31,332,600	$ 31,332,600	$ 31,332,600	
Strategic Investment Fund (SIF) Participation														
Transfer Out - Strategic Investment Participation (14%)	-	9,700	4,256	-	-	-	-	-	-	-	-	-	-	
Transfer Out - Strategic Investment Participation - Mandatory Fees	981,701	979,300	1,845,200	1,845,240		1,845,240			-	1,808,000	2,280,000	2,280,000	2,280,000	
For Reference: Mandatory Fee Participation Rate	*n/a*	*5.0%*	*8.0%*						*8.0%*	*8.0%*	*8.0%*	*8.0%*	*8.0%*	
(D) **Total Strategic Investment Fund Participation**	$ 981,701	$ 989,000	$ 1,849,456	$ 1,845,240	$ -	$ 1,845,240	$ -	$ -	$ -	$ 1,808,000	$ 2,280,000	$ 2,280,000	$ 2,280,000	
(E) **Total Revenue (C-D)**	$ 19,839,595	$ 23,497,754	$ 19,753,403	$ 23,954,275	$ (464,600)	$ 23,489,675	$ 25,334,915	$ -	$ 25,334,915	$ 23,624,600	$ 29,052,600	$ 29,052,600	$ 29,052,600	

	FY 2020 Actuals	FY 2021 Actuals	FY 2022 IRM Statement	FY 2022 Original Budget	Budget Adjustments	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection	Assumptions
EXPENSES														
Support Unit Expense														
Support Unit Expense Allocation	-	-	-	-	-	-	-	-	-	-	-	-	-	
For Reference: Allocation Rate (applied to Sales & Svc and Other Operating Revenues)	*n/a*	*n/a*	*n/a*						*n/a*	*24.5%*	*24.5%*	*24.5%*	*24.5%*	*(Note: Admin Support Rate = 24.5%; Academic Support Rate = 13.8%)*
(F) **Total Support Unit Expense Allocation**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	
Direct Expenses - For Support Areas														
Utilities	-	-	-	-	-	-	-	-	-	-	-	-	-	
Charges for Service Level Agreements (SLAs)	-	-	-	-	-	-	-	-	-	-	-	-	-	
Facilities Charges *(Note - Do not duplicate expenses also shown in SLAs)*	-	-	-	-	-	-	-	-	-	-	-	-	-	
(G) **Total Direct Expenses - For Support Areas**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	
Direct Expenses - Personnel														
Faculty Salary	-	-	59,400	-	-	-	-	-	-	-	-	-	-	
A&P and Classified Salary	8,021,063	9,856,808	10,947,062	11,642,846	-	11,642,846	5,441,324	5,700,206	11,141,530	12,123,070	12,739,454	13,392,821	14,085,390	
Wages or Hourly Salary	330,863	375,396	395,166	500,000	-	500,000	227,049	230,000	457,049	535,000	567,100	601,126	637,194	

	FY 2020 Actuals	FY 2021 Actuals	FY 2022 IRM Statement	FY 2022 Original Budget	Budget Adjustments	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection	Assumptions
Benefits	2,490,066	3,017,514	3,759,355	3,114,301	-	3,114,301	1,654,677	1,670,000	3,324,677	3,382,615	3,549,572	3,726,546	3,914,139	
(H) Total Direct Expenses - Personnel	$ 10,841,992	$ 13,249,718	$ 15,160,983	$ 15,257,147	$ -	$ 15,257,147	$ 7,323,051	$ 7,600,206	$ 14,923,257	$ 16,040,685	$ 16,856,126	$ 17,720,494	$ 18,636,723	
Direct Expenses - Non-Personnel														Projections do not included any new initiatives
M&O Budget	9,299,906	6,608,434	7,301,363	6,247,181	-	6,247,181	7,533,171	1,350,000	8,883,171	8,916,295	10,852,518	16,513,363	15,617,346	
Vendor Payment *(separated out of M&O Budget Line)*	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers Out - Debt Service	328,107	-	-	-	-	-	-	-	-	-	-	-	-	
(I) Total Direct Expenses - Non-Personnel	$ 9,628,013	$ 6,608,434	$ 7,301,363	$ 6,247,181	$ -	$ 6,247,181	$ 7,533,171	$ 1,350,000	$ 8,883,171	$ 8,916,295	$ 10,852,518	$ 16,513,363	$ 15,617,346	
(J) Total Expenses Before Transfers (F+G+H+I)	$ 20,470,005	$ 19,858,152	$ 22,462,346	$ 21,504,329	$ -	$ 21,504,329	$ 14,856,222	$ 8,950,206	$ 23,806,427	$ 24,956,980	$ 27,708,644	$ 34,233,857	$ 34,254,069	

	FY 2020 Actuals	FY 2021 Actuals	FY 2022 IRM Statement	FY 2022 Original Budget	Budget Adjustments	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection	Assumptions
OPERATIONAL TRANSFERS														
Operating Transfers - To (From) Other Units														
Transfers To (From) Other Units	1,608,891	1,367,620	2,150,918	1,367,620	-	1,367,620	1,367,620	-	1,367,620	-	-	-	-	
Transfers To (From) Other Units	1,200,291	1,200,291	-	698,800	-	698,800	469,184	229,616	698,800	755,000	800,000	825,000	850,000	
Transfers To (From) Other Units	300,000	300,000	-	-	-	-	-	-	-	-	-	-	-	
Transfers To (From) Other Units	499,892	435,378	-	435,378	-	435,378	435,378	-	435,378	-	-	-	-	
(K) Total Operating Transfers - To (From) Other Units	$ 3,609,074	$ 3,303,289	$ 2,150,918	$ 2,501,798	$ -	$ 2,501,798	$ 2,272,182	$ 229,616	$ 2,501,798	$ 755,000	$ 800,000	$ 825,000	$ 850,000	
Operating Transfers - Within Campus Services Departments														
Transfers To (From) Dept, Cost Center or Fund #1	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers To (From) Dept, Cost Center or Fund #2	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers To (From) Dept, Cost Center or Fund #3	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers To (From) Dept, Cost Center or Fund #4	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers To (From) Dept, Cost Center or Fund #5	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers To (From) Dept, Cost Center or Fund #6	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers To (From) Dept, Cost Center or Fund #7	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers To (From) Dept, Cost Center or Fund #8	-	-	-	-	-	-	-	-	-	-	-	-	-	
(L) Total Operating Transfers - To (From) Campus Services Departments	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	
(M) Total Operating Transfers (K+L)	$ 3,609,074	$ 3,303,289	$ 2,150,918	$ 2,501,798	$ -	$ 2,501,798	$ 2,272,182	$ 229,616	$ 2,501,798	$ 755,000	$ 800,000	$ 825,000	$ 850,000	
(N) Total Expenses and Operating Transfers (J+M)	$ 24,079,079	$ 23,161,441	$ 24,613,264	$ 24,006,127	$ -	$ 24,006,127	$ 17,128,404	$ 9,179,822	$ 26,308,225	$ 25,711,980	$ 28,508,644	$ 35,058,857	$ 35,104,069	
(O) Balance (Deficit) Before Transfers to Cover Shortfall (E-N)	$ (4,239,484)	$ 336,312	$ (4,859,861)	$ (51,852)	$ (464,600)	$ (516,452)	$ 8,206,511	$ (9,179,822)	$ (973,310)	$ (2,087,380)	$ 543,956	$ (6,006,257)	$ (6,051,469)	
Funding Transfers in to Cover Shortfall														
Transfers In - From HEERF	-	-	-	-	-	-	-	-	-	-	-	-	-	
Transfers In - From Other Operations to cover shortfall	-	-	-	-	-	-	-	-	-	-	-	-	-	
(P) Total Transfers to Cover Shortfall	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	
(Q) Total Year End Balance (Deficit) (O+P)	$ (4,239,484)	$ 336,312	$ (4,859,861)	$ (51,852)	$ (464,600)	$ (516,452)	$ 8,206,511	$ (9,179,822)	$ (973,310)	$ (2,087,380)	$ 543,956	$ (6,006,257)	$ (6,051,469)	

	FY 2020 Actuals	FY 2021 Actuals		FY 2022 Original Budget	Budget Adjustments	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection	
Amt. Included in YE Balance That Rolls Fwd to Cover POs	1,135,188	988,698	-	-	-	-	-	-	-	-	-	-	-	
Amt. Included in YE Balance That Lapses to Reserve Funds	(5,374,672)	(652,386)	(4,859,861)	(51,852)	(427,432)	(479,284)	6,398,439	(9,179,822)	(2,781,382)	(2,087,380)	543,956	(6,006,257)	(6,051,469)	

Reserve Funds	FY 2020 Actuals	FY 2021 Actuals	FY 2022 IRM Statement	FY 2022 Original Budget	Budget Adjustments	FY 2022 Revised Budget	YTD Activity	Est. Activity Thru YE	FY 2022 Year End Projection	FY 2023 Projection	FY 2024 Projection	FY 2025 Projection	FY 2026 Projection	Assumptions
® Reserve Fund Beginning Balance	-	2,296,749	-	2,298,666	-	2,298,666	2,298,666	-	2,298,666	(482,716)	(2,570,096)	(2,026,141)	(8,032,397)	
Lapsed Amount Added to / Removed from Reserve Funds	(5,374,672)	(652,386)	-	(51,852)	(427,432)	(479,284)	6,398,439	(9,179,822)	(2,781,382)	(2,087,380)	543,956	(6,006,257)	(6,051,469)	
Other Activity in Reserve Fund (explain)	7,671,421	654,303	-	-	-	-	-	-	-	-	-	-	-	
(S) Reserve Fund Ending Balance	$ 2,296,749	$ 2,298,666	$ -	$ 2,246,814	$ (427,432)	$ 1,819,382	$ 8,697,106	$ (9,179,822)	$ (482,716)	$ (2,570,096)	$ (2,026,141)	$ (8,032,397)	$ (14,083,866)	
Reserves as a Percentage of Expense & Operating Transfers		9.92%		9.36%					-1.83%	-10.00%	-7.11%	-22.91%	-40.12%	
Reserves as a Percentage of Outstanding Debt	#DIV/0!	#DIV/0!							#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
For Reference: Outstanding Debt (at the end of the FY)	-	-							-	-	-	-	-	
Ratio: Net Income to Debt Service		#DIV/0!		#DIV/0!					#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	

UTSA.
The University of Texas at San Antonio™

Operational Review Packet

Name of Unit: University Technology Solutions

College / Division:

Contact Name: Jenell Bramlage

Phone/Email: jenell.bramlage@utsa.edu

Type of Unit:

Academic Support Unit	☐	**Auxiliary Unit**	X
Administrative Support Unit	☐		

REQUIRED DOCUMENTS:

FIRST SUBMITTAL -

General Information to "Tell Your Story" [X]

Explain "who you are", "what you do", "how you do it", and "how it aligns to the destination & strategic initiatives."

Organizational Chart and Position Data [X]

Provide snapshot of functional organization chart with FTE information; identify potential or planned staffing or organization changes

SECOND SUBMITTAL -

Challenges / Opportunities [X]

Explain critical issues and identify potential opportunities and efficiencies; discuss benefits to students and campus

Key Performance Indicators / Benchmarks / Comparisons [X]

Provide operational and efficiency metrics along with benchmarks or comparisons; Explain service delivery model framework, including service expectations and aspirations

Budget / Actual Financial Data [X]

5-Year Proforma; Provide actuals for prior 2 years, current year projection, and 2 additional future year projections [Note: Template will be provided]

Explanation of Reserves [X]

Provide details of current balances and practice of adding to reserves each year; Provide 3 years of prior growth and current projection.

Supplemental Information *(Optional)* :

Customer Surveys	X	*Summary of current year results, along with changes over time*
External Review Data	X	*Summary of results from an external source, such as related to accreditation/assessment*
Trending Data	X	*Trend data showing how an operation has changed over time, explaining conclusions*

Describe Any Additional Information Provided *(Optional)* :

Routing and Approvals:

Unit Director / AVP Signature: *Jenell Bramlage*   **Date:** 03/11/2022

Printed Name: Jenell Bramlage

Dean / VP Approval Signature: *Kendra Ketchum*   **Date:** 03/11/2022

Printed Name: Kendra Ketchum

* Include this cover sheet with the packet submitted to Operational Review Governance Committee