Service Catalog Analysis Recommendations

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Working Group Charge: Develop principles to guide analysis of service inventory data to ensure recommendations support mission of the university; narrowly define the business problems to be solved, and develop a list of key business questions to provide focus for the analysis.

Working Group Work: The committee met three times in March 2017 to develop the business questions to be addressed by the analysis of the Service Catalog data collected from UW-Madison information technology service units.

As a working group, we propose the following business questions be answered through the analysis:

Business Strategic Questions to Ask of the Analysis Team

Can analysis identify one to three opportunities for services that are scalable campus-wide?

- How might such services be scaled to better support research, teaching, and/or administrative excellence while also maintaining or improving the value to customers and stakeholders?
- How might the service improve integration and operational coherence to achieve increased value to stakeholders and reduce redundancy with the intent of freeing resources to support innovation in teaching and learning, research, administration, and outreach?

In addition to the business questions, the committee developed guiding principles to help ensure any recommendations respect the university's missions of research, teaching, learning, and outreach; shared governance; and continue to foster a culture of innovation.

We propose the analysis team use the following guiding principles:

Guiding Principles

A. Support and advance the university mission by…
   1. Using analysis and recommendations to advance continuous improvement in teaching and learning, research, administration, and outreach;
   2. Writing recommendations that free divisions to focus on their mission by instantiating services appropriately on the spectrum of centralized and localized IT service models; and
   3. Identifying and preserving local services that support domain-level innovation and sustain discipline-specific expertise and opportunities for growth.

In conducting the Analysis Phase,

1. Recognize the business, research, and teaching needs of the local organizational unit;
2. Avoid oversimplifying and aggregating data into high-level summaries that describe diverse services, thereby masking potentially significant variability; and
3. Understand why variations in services exist, currently, for each service provider and classify these services in like groupings.

B. Understand the value stakeholders' gain from current services.

Before developing an analysis recommendation, understand and consider the value of the current system both to the business, and to the stakeholders. Steps in this assessment include:

1. Asking Deans or School/College/Division leadership to provide perspective on strategic priorities and alignment of IT to ensure value is preserved;
2. Asking customers about their experience with and value of existing IT services; and
3. Validating analysis recommendations with respondents from the Data Collection phase to understand the value of services to customers.

C. Understand stakeholder requirements:

When requirements are undefined, vague, or contradictory, engage all stakeholders to elicit, validate, and document requirements. These steps include:

1. Identifying where further elicitation of business and stakeholder requirements is needed;
2. Engaging stakeholders (e.g., service providers and users) to ensure a full understanding of requirements;
3. Engaging technical staff to understand "current state" solution requirements (e.g., technical and process dependencies, as well as the local service integration and management expertise) for service provision;
4. Including in the "future state" analysis a security risk assessment by Cybersecurity and stakeholders; and
5. Assessing how well these requirements are met during the lifecycle of the "future state" solution.

Analysis Team Recommendation:

The intent is for the analysis work be completed by UW-Madison staff who are independent from the TAG membership. To ensure a thorough and objective analysis we recommend the analysis be completed by a taskforce composed of but not limited to the roles of professional analysts, financial staff, and IT professionals from multiple offices/units on campus.

The expectation is that the analysis team will seek additional stakeholder information as needed to inform its recommendations. Analysis outcome should include recommendations for appropriate funding models.

The analysis outcomes will be brought to the four TAGs for discussion and comment and provided to campus Shared Governance for review.