



UW-Madison
Administrative Excellence – Shaping Our Future
Phase II Work Team Project Charter
Data Center Aggregation

December 14, 2011 v4.1 dgk
Approved by Steering Committee November 23, 2011 (v3)
Reviewed by Advisory Committee December 1, 2011 (v3)

Team Name	Information Technology - Data Center Aggregation
Objective	<p>The objective of this project, as prioritized by the Advisory Committee and approved by the Steering Committee, is to build out the aggregation of a data center as proposed within Phase I of Administrative Excellence. This will include incorporating salient portions of the work completed within the campus project launched in May of 2010.</p> <p>Team members will help to review existing requirements results, vendor evaluations, and collect data in support of the creation of a recommendation and actionable business case for an aggregated data center for UW-Madison.</p>
Goal	Develop a new model of server and data center structure to serve the needs of the University's academic, research, and administrative communities, leveraging industry-leading practices for server administration, virtualization, and management to save costs, improve service levels, and minimize data security risks.
Scope	<p>The primary scope of this workstream is to build on the existing work that has been completed across the University and provide a mechanism through which an enterprise-optimal solution for Data Center Aggregation is developed. It is anticipated that this will be done through:</p> <ul style="list-style-type: none">• a comprehensive review of existing efforts currently underway between the Office of the CIO, DoIT, and other IT groups (e.g., ITC and MTAG) including the scope and models currently considered, requirements gathered, constituents considered, knowledge developed to date, policies drafted, and any roadblocks identified• the collection of comprehensive and enterprise-wide data on the current distribution of servers and data centers operated across UW-Madison including quantification of the attendant operating costs including local (e.g., software, labor) and central costs (e.g., utilities, space)• the creation of a business case document that defines the current-state, provides a recommendation for a future-state, and outlines the processes uses and alternates considered to reach that recommendation <p>The scope of this workstream will include servers and data centers supporting administrative, academic, and research computing operated across the UW-Madison enterprise.</p> <p>The cost analyses conducted will include the direct costs of the current state and potential future-state aggregated data centers including costs that are not currently visible to local units (e.g., costs of space and utilities).</p>
Critical Assumptions	<ul style="list-style-type: none">• The work covered under this charter will build upon an existing project and will be able to leverage the information and knowledge built by their efforts• Central and distributed IT organizations will promptly respond to data



	<p>requests made by this team</p> <ul style="list-style-type: none">• The established Administrative Excellence issue resolution processes will resolve issues as they arise• All team members will be able to dedicate at least one day (8 hours) per week for a concentrated period of approximately 6 to 8 weeks, and then additional time thereafter (to be determined as required but estimated to be 2 to 4 hours per week for 4 to 6 weeks)• The team leader will be able to dedicate at least 10 hours per week for a concentrated period of approximately 8 weeks, and then additional time thereafter (to be determined as required but estimated to be 4 to 6 hours per week for 6 to 8 weeks)• The scope of this project will be limited to the development of necessary implementation planning deliverables related to data center aggregation across the UW-Madison enterprise
<p>Timeline</p>	<p>22 weeks encompassing the following activities</p> <ul style="list-style-type: none">• Pre-Work– Additional data collection: gather information from the existing effort conducted between the office of the CIO, DoIT, and FP&M, form team• Weeks 1 to 2 – Hold first two team meetings to confirm scope, identify data needed for Business Case Document, review and learn from work conducted to date, develop a detailed project plan• Weeks 3 to 4 –Define specific additional data required, draft IT data definitions for each data element to support a data collection process, draft framework for service levels and policies attendant to aggregating data centers within a central function, brainstorm range of potential future-state service delivery options• Weeks 5 to 6 - Assign roles for business case development, and provide guidance to AE project staff on implementation strategies and necessary or desired policies; finalize data definitions and data request document to be distributed to the IT community including broader communication regarding the purpose of the request and the link to other IT activities;• Weeks 7 to 8 – Distribute data request document; discuss business case content, identify gaps in analysis, and assign additional responsibilities for drafting business case and implementation plan; conduct interviews with distributed IT staff and governance groups as appropriate;• Weeks 9 to 10 – Evaluate brainstormed options for future-state service delivery and begin to develop a financial model for each including capital investment costs, efficiencies identified, etc.; work with research community to identify sponsored program funding policies consistent with appropriate regulations regarding cost allocation.• Week 11 – Receive and analyze data from data collection process; continue to work on business case, discuss business case content, identify gaps in analysis, and assign additional responsibilities for drafting business case and implementation plan; conduct additional analysis as required.• Weeks 12 through 14 – Incorporate data into business case and draft the final business case document• Week 15 – Present recommendation(s) and final business case to the Advisory Committee.• Weeks 16 and 17 – Adjust business case/plan based on Advisory Committee feedback• Week 18 – Present business case/plan to Steering Committee• Week 19 –Debrief Steering Committee meeting and to determine next



	<p>steps, if any</p> <ul style="list-style-type: none"> • Weeks 20 to 21 – Refine financial and funding models, communication plan, stakeholder engagement, and step-by-step implementation plans, and policy language • Week 22 – Present material to Steering Committee for go/no-go decision 	
Deliverables	<p>Project Deliverables</p> <ul style="list-style-type: none"> • Quantification of the efficiency opportunity for the aggregation of all campus data centers into future-state options • Data request document to be distributed to the IT community across campus including clear data definitions, description of purpose and goals, and specifics regarding all data centers and servers across the UW-Madison enterprise including a documentation (or informed estimate) of the attendant costs of service delivery • Interim project presentation to the Advisory Committee • Completed Business Case in the appropriate template • Draft policy document outlining policies attendant to data center aggregation and operation of servers outside of the selected future-state model • Policy documents and communication plans required for implementation or attendant recommendations to the Administrative Excellence Steering committee regarding appropriate policies required for implementation <p>Project Management Deliverables</p> <ul style="list-style-type: none"> • Weekly status updates • Completion of issue tracking <p>Additional interim deliverables may be required as the team identifies additional needs for Advisory Committee and/or Steering Committee review during the course of the workstream.</p>	
Team Members	<p>Team Leader - Ed Van Gemert (General Library System) Team Member – Steve Krogull (DoIT) Team Member – Phil Barak (CALIS) Team Member – Rick Konopacki (SMPH) Team Member – Kevin Cherek (AIMS) Team Member – Nancy McDermott (L&S) Team Member – Dan Motl (FPM) Team Member – Melissa Amos-Landgraf (Education) Team Member – student representative (tbd) Project Support – Chris Slatter (Huron Consulting Group)</p>	
Project Members	Member Name	Member Role
	Team Member	Provide feedback for data collection and analysis activities; assist in data gathering; contribute to development of proposed solutions, business case and implementation plan; assist in communication effort and stakeholder engagement.
	Team Leader	In addition to the responsibilities of a working team member, the team leader will be responsible for partnering with Huron and AE to develop agendas and facilitate team meetings; identify task owners and assign



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		relevant tasks and responsibilities to the group; support deliverable creation.
	Business Process Owners	Support data collection activities; vet proposed solutions, business cases, policy language, and initiative communication, stakeholder engagement, and step-by-step implementation plans.
	Administrative Excellence Project Staff	Provide overall project management and guidance through the development of agendas, tracking of team progress, and escalating issues as needed; build the communication plan, stakeholder engagement, and step-by-step implementation plans and policy language; support business case development process and presentation of deliverables to Advisory Committee and Steering Committee.
	Huron Consulting Group	Contribute to data collection process and perform necessary data analysis; provide project management and guidance through the development of agendas, tracking of team progress, and escalating issues as needed; partner with AE to build initiative communication, stakeholder engagement, and step-by-step implementation plans and policy language; support business case development process and presentation of deliverables to Steering Committee.
	Advisory Committee	Review initial drafts of business case and implementation plan and provide feedback.
	Steering Committee	Review business case and implementation plan and provide feedback; provide final decision to implement.