

ANNUAL PLANNING KEY OBJECTIVES

2020 - 2021

Purpose

This document serves as a framework for the 2020-21 fiscal year’s annual plan. These are key objectives for the next year that are developed within the context of the One I.S. Strategic Plan and address operations, ongoing initiatives, and new projects. It will be used by Directors to establish their annual plans for next year and becomes the guide for assessing quarterly progress towards our annual plan.

It is organized into six categories: Pandemic Response, Trust, Foundations, Culture, Transformation, and Collaboration. Each of these categories defines initiatives in progress or to be launched, and operational support expectations. The last section provides observational analysis of the plan.

COVID-19 pandemic responses are our immediate and highest priority. All subsequent sections of the plan depend on the length and severity of the pandemic and many of the goals in these sections may be delayed, deferred, or cancelled depending on availability of resources and funding. To accommodate these changes and to keep track of these goals for future years, a Parking Lot section has been created.

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Pandemic Response

COVID-19 pandemic responses are our immediate and highest priority.

April

Our first stage of response is to react to circumstances as the Spring Term winds down. We will do our best to manage expectations carefully and focus our best efforts to keep faculty teaching, students learning, researchers researching, and staff working. For the most part we will get through this term using proven technologies and services, but will be prepared to adapt to changes as necessary.

- Goal:** Ensure availability of existing software and technology
 Service(s): Remote Desktop for desktops and labs; build inventory of loaner laptops; resolve licensing issues in new environment
- Goal:** Prepare existing teaching, researching, and working tools for new environment:
 Service(s): Learning Management System (Canvas), Video Conferencing (Blue Jeans, Blackboard Collaborate Ultra, Zoom), Lecture Capture and Share (MediaSite), File sharing (SFU Vault), Online grading (CrowdMark), phone conference bridge, Online exam proctoring, etc.
- Goal:** Maintain core services
 Service(s): Work from home for most IT Services staff; define essential services needed in campus such as Network Operations Centre; adjust Service Desk to online support; telephone switchboard; internet at home funding; build up capability to support devices remotely
- Goal:** Communicate remote resources
 Service(s): Inform community as services are added or changed; continue to update remote resources web site
- Goal:** Improve videoconferencing functionality
 Q1 | Sandeep Sidhu, Mark Roman
 Project(s): Implement Zoom

Summer Term

As April winds down we hope to have improved services for the Summer Term. We will shift out of react mode and begin responding to unmet needs by implementing improved solutions. Over the summer term we can enhance our online services for teaching, learning, research, and work-at-home.

- Goal:** Improve remote collaboration functionality

Q1 | Sandeep Sidhu, Keith Fong, Michael Thorson

Project(s): Implement MS Teams

Goal: Adjust operational and project budgeting to adapt to changing circumstances

Q2 | Jennifer Casey, Dave Townsend

Goal: Support the delivery of virtual convocation

Q2 | Sandeep Sidhu

Goal: Identify, and possibly implement, exam proctoring tools

Q2 | Keith Fong, Sandeep Sidhu

Goal: Implement solution to support virtual events and webinars

Q2 | Sandeep Sidhu

Project(s): Implement Zoom for Webinars

Goal: Improve security for managed devices, to support remote work

Employees are more vulnerable to cyberattacks working remotely. By issuing secure managed laptops and phones and providing security best practices, we can reduce this risk.

Q2 | Sandeep Sidhu

Project(s): Managed windows project

Goal: Align IT Service Delivery model and workforce for remote support

Q1-Q2 | Sandeep Sidhu

Project(s): Implement one number and one email; develop cross functional teams

Goal: Scale Lecture capture and share solution (MediaSite)

Q2 | Sandeep Sidhu

Fall Term

If the pandemic continues into the Fall Term we will be ready with robust and strongly supported solutions. We will focus project efforts to deliver sustainable remote teaching, studying, researching, and work-from-home solutions in preparation for future scenarios.

Post Pandemic

Develop plans for recovery from temporary changes made during the pandemic.

Trust

Create substantial, sustained, and justified trust in our information systems.

Information Systems Security Council (ISSC)

The Information Systems Security Council started as a mechanism for sharing information across multiple Information Systems departments. Information sharing is no longer sufficient and the council needs to evolve into a decision-making body to become more effective. We will continue to develop a new Terms of Reference (ToR) for the ISSC.

Goal: Improve security decision-making process
Q2 | Mark Roman
Project(s): Implement Information Systems Security Council stewardship process and committee.

General security posture

We need to accelerate continuous improvement of our security posture to ensure the confidentiality, integrity, and availability of our information systems. As an example, we need to reduce Critical Threats identified in scans by 50%.

Goal: Accelerate continuous improvement of our information security posture.
Q1-Q4 | Dave Townsend
Project(s): Improve PCI DSS Compliance; Enhance Security Logging and Monitoring; Improve Vulnerability Management

Goal: Amalgamate IP subnet.
Q2 | Michael Thorson

Goal: Implement internal Public Key Infrastructure (PKI) service.
Q1-Q2 | Michael Thorson
Project(s): Implement Internal certification service

Goal: Offload services from Fraser and retire system.
Q1-Q2 | Michael Thorson
Project(s): Document Fraser usage, implement substitute services

Goal: Automate Linux Security Patching
Q1-Q4 | Michael Thorson
Project(s): Linux Life Cycle Management

Goal: Review enterprise back-up process to ensure sustainable; review options if not.
Q1 | Michael Thorson

Project(s): Operational Excellence

Goal: Implement an advanced research computing (ARC) cybersecurity action plan.
Q1-Q4 | Martin Siegert

Project(s): Implementation of the recommendations from the cyber security assessment (Q1-Q4); Installation of a network security appliance to monitor network traffic to/from the Cedar facility (Q1-Q2); Implementation of MFA for Compute Canada services (Q1-Q4)

Review security organization

Is our information security organization structure effective? With resources currently split across two departments (and a third one coming this year) there are missed opportunities. We need to resolve these issues and leverage the full value of our team.

Goal: Improve integration of our security staff.
Q1-Q3 | Mark Roman

Project(s): Review strengths, weaknesses, opportunities, and threats of our structure and implement changes.

Standards

Security standards and guidelines need to be developed to guide our community on the One I.S. Information Systems Policy. These will require input from all across IT, as well as incorporating industry best practices.

Goal: Develop information security standards and guidelines.
Q1-Q4 | Dave Townsend

Project(s): Develop One I.S. Policy Family

Goal: Improve standardization of technology procurement.

Project(s): Onboard to BCNET Audio Visual prequalified vendors
Q1-Q2 | Sandeep Sidhu

Project(s): In partnership with Facilities develop Owners Technical Requirements to improve technology installation quality for external vendors
Q1-Q3 | Sandeep Sidhu

Progress

We need to assess information security progress against the review done in 2017. Are our resources being used effectively? This may require an external review.

- Goal:** Assess information security posture.
Q1-Q2 | Mark Roman
Project(s): Perform external Post Security Incident Analysis of February 27 data breach.

One I.S. Policy

A broad overarching policy for information systems, driven by the underlying need for reducing information systems risk, is essential to fostering good stewardship of SFU's information systems resources. The One I.S. Policy is an umbrella policy designed to mitigate information systems risk in the areas of compliance, security, identity, data, procurement, acceptable use, and asset management and is designed to replace GP 24 (Fair Use). For these reasons, the One I.S. policy needs to be moved forward aggressively with the target of finalizing it and getting formal approval this year.

- Goal:** Develop an information systems policy framework.
Q1-Q4 | Dave Townsend
Project(s): Develop One I.S. Policy Family

Disaster Recovery

The culmination of a major three-year effort resulted in a successful DRP test. Now we need to review the results in a detailed post-mortem exercise to understand if any components are incomplete or if there are any unresolved concerns. Based on this analysis we need to plan further tests through the year, possibly on a quarterly basis, to resolve outstanding issues. By December 2020 we should run a complete end-to-end test with 100% success.

- Goal:** Complete end-to-end testing of all mission-critical processes.
Q1-Q4 | Keith Fong and Michael Thorson
Project(s): Disaster Recovery Plan Project
- Goal:** Complete move of all systems from the old systems environment to SFU Cloud.
Q2-Q3 | Michael Thorson and Keith Fong
Project(s): Strand Hall Data Centre Move Project
- Goal:** Include teaching and learning mission-critical systems (Mediasite, Audio recording) to DRP
Q1-Q4 | Sandeep Sidhu and Michael Thorson

Project(s): Disaster Recovery Plan Project

Multi-Factor Authentication (MFA)

Lessons learned from the MFA pilot project have been assimilated and we are ready to move forward aggressively with the SFU-wide MFA rollout. This initiative requires CAS-enabling all planned applications (PeopleSoft, etc.) ASAP. It also requires that this project work with the Security Committee, One I.S., Data Governance, and the community to ensure that we are prioritizing and protecting the right systems.

Goal: Implement MFA for all users with privileged access to key systems.
Q2-Q4 | Keith Fong and Michael Thorson
Project(s): MFA Phase 3

Goal: Recommend MFA solution for other authentication methods.
Q2-Q4 | Keith Fong and Michael Thorson
Project(s): MFA Phase 3

Identity Management

Issues with the flexibility and supportability of our existing identity management system are becoming critical and they are putting all of SFU at risk. The work to replace this system has been on hold as the MFA project has consumed our resources and attention in this area. But in the next year we need to begin the Identity Management system project in earnest.

Goal: Produce a detailed multi-year roadmap for the Identity Management Program.
Q1-Q4 | Keith Fong
Project(s): IAM - Systems Requirements Discovery; IAM – Landscape Analysis

Goal: Replace a portion of the old identity management systems and architecture.
Q3-Q4 | Keith Fong
Project(s): Identity Management Replacement

Goal: Develop a new front end for some of the key identity management systems, facilitating the move to a new back end.
Q3-Q4 | Keith Fong
Project(s): Identity Management Replacement

Single Sign-On

As we increase security layers, access to systems becomes more effort for our client colleagues. We need to investigate single sign-on opportunities in conjunction with our identity management project that will work with our MFA technology.

- Goal:** Enable CAS on all ITS browser-based applications that support it.
Q1-Q3 | Keith Fong
Project(s): FINS PeopleSoft CAS Integration; myINFO PeopleSoft CAS Integration;
goSFU PeopleSoft CAS Integration

Unified Relationship Management

Transition from multiple points of client relationship management to a more strategic relationship management model. Primary objective is to break down the silos separating IT functional units to optimize cohesive organizational effectiveness.

- Goal:** Develop a mechanism to capture formal and informal feedback provided by our partners and colleagues.
Q1-Q2 | Sandeep Sidhu
Project(s): Expand the online feedback solution implemented in Service Desk to include Service Centers
- Goal:** Document all agreements between IT Services and other partners and colleagues using a consistent process and standardized MOU's (Memorandum of Understanding).
Q1-Q4 | Sandeep Sidhu

Foundations

Continue to eliminate SFU's technology deficit, reduce risks to the institution, and build the on-ramp to the future of information systems.

WiFi project

Replacement of all existing WiFi access points will be complete early in 2020 and increased coverage to all campuses will be complete prior to students returning in September. Additional features such as guest access and improved monitoring will be complete within the fiscal year.

Essential to the successful completion of this project is clear communication about the magnitude of the change. If we are not careful, our user community will assume upgraded wireless just simply happened. We need effective communications in all affected areas to identify the project's impacts.

Before wrapping up the project we need to define how we can build on this new service. For example, what can we do with the data we can collect? Can we provide improved learning analytics in the classroom while protecting privacy? Can we improve staff and student safety? Can the data improve space utilization and traffic flow? Can we integrate this data with other data to better control things like lights, heating and cooling?

Goal: Update WiFi Network to include Guest.
Q1-Q3 | Michael Thorson
Project(s): Extend WiFi coverage (Q1-Q3); Implement Guest (Q2)

Cell coverage

We need improved cell coverage to the campus to increased safety and improve client satisfaction with our services. To do this will require us to work closely with our cell vendors and push them more aggressively this year. This focus should also include moving all three campuses to a cell infrastructure that can support the on-coming 5G technology and the expectations of use that this will bring from our students, staff and faculty.

Goal: Expand cell service across campus (in collaboration with vendors and Facilities Services).
Q4 | Michael Thorson
Project(s): Partner with Facilities Services and cell service providers

Cedar Upgrade

Our largest project by financial measures and compute capability this year is our massive Cedar upgrade. To meet the next Compute Canada RAC allocation deadline, all of our changes to Cedar

must be in production by April 1, 2020. Throughout fiscal 2020/21 our challenge is to allocate sufficient resources to support the system given the anticipated dramatic increase in volume of users and the associated growth in demand.

Goal: Implement service improvements to Cedar.
Q1-Q4 | Martin Siegert
Project(s): Replace OwnCloud platform with NextCloud (Q1-Q2); Add Kubernetes implementation to Cedar Cloud (Q3-Q4)

Desktop Transition

After email, the single most commonly used application at SFU is our managed desktop suite of software, so the Windows Managed Desktop project is essential to improved client satisfaction at SFU. This project implementation will be completed by autumn 2020, after which we need to perform a satisfaction survey with these users to assess the effectiveness of the project and any next steps. Follow-up work in subsequent phases of the project should investigate similar tools and functionality for other systems such as Linux, iOS, and Android.

Goal: Transition all Managed windows desktops and laptops to the new secure end point device management platform.
Q1-Q4 | Sandeep Sidhu
Project(s): Managed Windows transition to SCCM; Implement AD Certificate Services to support remote laptop support model

Unified Communications

The core of our existing phone system is from 1987. The last updates stem from a project in 1995 and the system needs to be upgraded. We have been discussing a fully unified communications platform for several years, and now is the opportunity to formally start investigating the viability of the technology.

This initiative will include threaded instant messaging, presence information, voice, extension mobility (cell), audio calling, video conferencing, desktop sharing, data sharing, call control, speech recognition, and unified inbox (integrated voicemail, e-mail, SMS, and fax).

Goal: Complete Phase 1 project activities including: charter/fund, requirements gathering, environment review/RFP, and migration to VOIP (dependent on cabling upgrade).
Q4 | Michael Thorson
Project(s): Unified Communications Project (Phase 1)

Cabling Upgrade

To support key communication technology changes, such as Unified Communications, the legacy wired cable infrastructure must be upgraded. We need to finalize the existing draft project plan and acquire funding commitment (i.e. deferred maintenance government funding). Addressing the cabling deficiencies will also allow us to address the security of the wired network by implementing Network Access Control.

Goal: *See Parking Lot.*

Vault

SFU Vault is an incredibly popular service, however we have not been fully investing in its support. This year we need to improve Vault's operational processes, revisit its maintenance contract, solidify internal support, and examine which vendor is most appropriate (OwnCloud vs. NextCloud), or if we should recommend that the University move to cloud services such as Microsoft Office 365. We also need to implement new features such as in-line multi-author editing) that will allow Vault to replace usage of Google docs on campus.

Goal: Stabilize Vault service and support. Develop a file storage/sharing platform strategy and create Project Charter to start a next generation project.
Q2 | Michael Thorson
Project(s): Secure File Sharing Project

DB2 Decommissioning

With a vendor-imposed deadline to decommission DB2 looming in the next 2 years we must plan for shutting it down and replacing it with a new database management system for PeopleSoft and a new source of data for downstream systems such as CSRPT. This issue forces a strategic technology change, which may expand to the server level, requiring us to perform a needs analysis to ensure our teams have the right skills and staffing to run our ERP in this new environment.

Goal: Migrate PeopleSoft systems from DB2 to a new DB platform.
Q1-Q4+ | Keith Fong and Michael Thorson
Project(s): PeopleSoft Platform Transformation Project; Student Data Warehouse Phase 2

Goal: Migrate all data stewards, faculties, and departments from CSRPT to the DataHub or the Data Warehouse prior to the DB2 decommissioning deadline.
Q1-Q4+ | Keith Fong and Eric Leung

Project(s): Student Data Warehouse Phase 2; CSRPT Replacement Discovery Project; CSRPT Replacement Project; Landscape Analysis of Student Reporting Database (CSRPT)

Operational Excellence

The Operational Excellence (OE) project charter will be approved, a service management product will be selected, and the project will begin implementation by the beginning of the new fiscal year. Implementation of at least one OE initiative (i.e. ticketing system, CMDB, service catalog, etc.) will be complete by the end of 2020/21. The OE Townhall Action Group will be a strong participant in the direction setting and implementation of this project.

- Goal:** Implement incident management. Replace current ticketing solution (eSupport) with industry standard service management solution to improve basic operational workflows and use lean processes.
Q1-Q4 | Michael Thorson and Sandeep Sidhu
Project(s): Operational Excellence
- Goal:** Implement asset management for all Information systems supported by IT Services.
Q1-Q3 | Michael Thorson and Sandeep Sidhu
Project(s): Operational Excellence
- Goal:** Implement DCIM Monitoring.
Q1 | Michael Thorson
Project(s): Operational Excellence
- Goal:** Change Client Services' response focus from reactive to proactive, with 60% of time spent on event monitoring and problem management activities and 40% on incident management.
Q1-Q4 | Sandeep Sidhu
- Goal:** Establish a community of practice for continuous service and process improvement.
Q1-Q4 | Sandeep Sidhu
- Goal:** Review and update knowledge base for all critical services by end of the fiscal year.
Q1-Q4 | Sandeep Sidhu

Budget Management

More accurate and trusted financial management of our operational and project costs is an essential improvement for next year. We also need to develop a service-based budget model in

and use it for future fiscal year budget preparations. This work will prepare us for developing financial value management process improvements in subsequent years.

- Goal:** Hire and on-board a new Manager, Budget Planning and Financial Management.
Q1 | Dave Townsend
- Goal:** Develop and implement a service-based budget model by re-defining processes as a result of new budget model changes, creating reporting methods for service-based costing, and delivering training to all budget managers/owners to support the new model.
Q2-Q4 | Dave Townsend
- Goal:** Review and improve financial management of operational and project costs. Transition Project Budget Management processes from the DTO/PMO over to the Manager, Budget Planning and Financial Management (once hired) and establish a process for monthly project financial status reporting.
Q2-Q4 | Dave Townsend and Jennifer Casey
- Goal:** Prepare new Server/Storage RFP.
Q2 | Michael Thorson
Project(s): Operational Excellence

Developing staff skills and capabilities

Developing and enhancing staff skills and capabilities to meet current and future anticipated need. Technology landscape is changing with convergence of various technologies, new trends such as Cloud, legacy technologies, focus on leadership and soft skills along with technical skills. Develop a new approach needs to support the development of our workforce.

- Goal:** Provide training and development to staff (as appropriate/required) to support the Annual Plan and Personal Development Plans.
Q1-Q4 | All Directors
- Goal:** Support organization-wide adoption of agile and lean thinking through formal and informal methods, including workshops, knowledge sharing, and coaching. Promote inter-team collaborations and agile workplace culture.
Q1-Q4 | Eric Leung
- Goal:** Increase capabilities across the Project Manager and Business Analyst resources in response to the demand for projects and change delivery. Topics will include change readiness, communication, user experience, and process engineering.
Q2-Q4 | Jennifer Casey

Workforce Capacity Planning

We need to track workforce capacity in order to know what resources are available to support operations and projects.

Goal: Establish a centralized process that outlines and tracks human resource capacity and utilization for projects versus operations based on skillsets.

Q2-Q4 | Jennifer Casey

Project(s): Process Improvement

Goal: Implement a process for all IT Services Project & Resource Managers to update and maintain the accuracy of resource capacity and utilization within the centralized tracking system.

Q3-Q4 | Jennifer Casey

Project(s): Process Improvement

Culture

Continuously improve the effectiveness of how we work together internally and externally.

Townhall Action Groups & Engagement

We will continue to vigorously invest in the support and growth of the Townhall Action Groups (TAGs) and the Volunteer Engagement team with regular reporting at each semester's Townhall Meeting, active leadership team support, and funding for approved initiatives.

At this point we are implementing a mentorship program, defining core values, building roadmaps to our future digital state, and delivery SFU Brainery. Each of these initiatives is being championed by a TAG or the Volunteer Engagement team. The Operations Excellence TAG is actively engaged in the OE work defined in the Foundations section of this document.

- Goal:** Develop and implement a Career Wayfinding Service in conjunction with the People Development Townhall Action Group (THAG).
 Q1-Q3 | Dave Townsend and Keith Fong
 Project(s): People Development Townhall Action Group
- Goal:** Operationalize Service Catalogue v2, SFU Brainery and "Ask Mark Anything" service by end of the year.
 Q1-Q4 | Sandeep Sidhu & Eric Leung
 Project(s): Collaborative Development Townhall Action Group
- Goal:** Complete two cohorts of the mentorship program and implement a continuous improvement plan in conjunction with the Mentorship Program Committee.
 Q1-Q4 | Sandeep Sidhu and Dave Townsend
 Project(s): Mentorship Program
- Goal:** Continue to support and facilitate the THAG – Culture group to collect, analyze and plan out ways of connecting with the community. This can include acceptable operating behaviours, activities, and project opportunities across teams.
 Q1-Q4 | Jennifer Casey & Keith Fong
 Project(s): Culture Townhall Action Group

Job Evaluations

The Human Resources (HR) led initiative to assess all information systems job descriptions requires our full support this year. The HR project needs to finish this year and then we need to use it as a baseline for building a career laddering model for all local and enterprise information systems staff at SFU.

- Goal:** Support the final implementation of the HR-led job evaluation initiative to evaluate all local & enterprise IT job descriptions using the Hay Method
Q1-Q2 | All Directors
Project(s): Job Evaluation Initiative
- Goal:** Create hybrid roles to improve the learning opportunities and our support model to support the converging technologies
Q1-Q4 | Sandeep Sidhu

Review Meeting Structure

We will continue to evolve our meeting structures to ensure decisions are made with the right people in the room, clear purpose is defined for each meeting to leverage maximum value from these conversations, and information is shared with the appropriate people at the right time.

- Goal:** Clarify meeting structure.
Q1-Q2 | Mark Roman
Project(s): Document meeting map.

Giving back to the Community

This year we will make an active effort to be socially responsible by donating a number of staff hours for improving a social cause or volunteer activity. This will be an opportunity for team building while making a positive difference in the society.

- Goal:** Introduce two annual events in partnership with United Way where staff can contribute their time for a good cause.
Q1-Q4 | Sandeep Sidhu

Transformation

Enable SFU to realize its dreams and aspirations by leveraging information systems to improve the effectiveness of the institution's people, processes, data, and technology.

Salesforce

This next year is our opportunity to turn Salesforce and its ecosystem of related products into an enterprise constituent relationship service for SFU. Although we cannot implement our full roadmap immediately, we need to set the stage by building on the strengths already delivered and completing next steps such as marketing automation.

The recently completed review of student services pushes for much stronger and better integrated student advising services across all of SFU. This effort will become a key priority for our Salesforce implementation this year.

We need to create broad-based support of our roadmap and develop formal agreements for enterprise use of Salesforce with Research, External Relations, Advancement, and each faculty. To make all of this work in a fiscally responsible manner we will need to negotiate an affordable enterprise contract with the vendor.

Salesforce is also our first major foray into external cloud computing. We need to continue to learn how the economic and technical models work to understand how we can use external cloud services for future systems.

- Goal:** Develop a clear licensing strategy and potentially a charge back model for Salesforce licenses.
Q1 | Keith Fong
- Goal:** Implement a marketing automation tool that integrates seamlessly with Salesforce to help recruit and engage with prospective undergraduate students and lifelong learners.
Q1-Q4 | Keith Fong
Project(s): Marketing Automation Discovery, Marketing Automation Implementation
- Goal:** Capture SFU's academic advising needs to determine if Salesforce Advisor Link (SAL) is a viable solution.
Q1-Q3 | Keith Fong
Project(s): Salesforce Advisor Link Discovery
- Goal:** Evaluate Salesforce for the CRM needs of University Advancement & Alumni Engagement.
Q1-Q4 | Keith Fong
Project(s): Salesforce for UAAE Discovery Project

- Goal:** Evaluate Salesforce for the CRM needs for SFU's external partner relationship management needs.
Q2-Q3 | Keith Fong

eTRACS

eTRACS plays a major role in modernizing faculty administrative and business processes, and integrate data from other SFU systems into eTRACS. It is designed to transform the world of planning spreadsheets into an integrated faculty management system to better support academic planning, budget preparation and reporting using data from various sources. This product is expected to improve the availability of information to our colleagues and enhance their operational capabilities.

eTRACS is remarkably popular with our colleagues for a number of reasons, not the least of which is its development methodology. As we move forward into the new fiscal year and begin phase 2, we need to continue to support the growth of this system. As an information systems organization we also need to embrace the agile doctrine and evangelize this approach throughout SFU.

- Goal:** Provide a basic contract generation system by Summer 2020 to allow current users of eTRACS to generate part time instructor contracts. By the end of 2020, further enhance the contract management process by implementing an approval workflow. At the end of the fiscal year, digitalize the contract management process by sending the data into MyInfo.
Q1 – Q4 | Eric Leung
Project(s): Enterprise TRACS Phase 2
- Goal:** Working closely with the Course Scheduling Phase 2 project team, by the end of that project, obtain full understanding of the capability of InfoSilem and identify opportunities for integration. In the meantime, determine the functional and technical requirements to allow course data to be sent from eTRACS into goSFU.
Q2 – Q4 | Eric Leung
Project(s): Enterprise TRACS Phase 2
- Goal:** Provide the functionality to create Instructional Activity Analysis (IAA) report using data from eTRACS and goSFU by working closely with IRP to improve the process to reduce manual back and forth between departments as well as reduce data cleanup for the IRP team. Roll out the feature to Faculty of Environment (FENV), Faculty of Communication, Art and Technology (FCAT) and any other faculties who are interested.
Q1 – Q4 | Eric Leung
Project(s): Enterprise TRACS Phase 2

- Goal:** Work with Labor Relations to identify process improvements to reduce manual processes and data gaps for Sessional Instructors (SI) seniority reporting. The team will start with generating the report, validating with LR, working on digital transformation and putting in place a proper process for Sessional Instructors Workload Tracking. This is similar to IAA reporting but working with LR. All Faculties will be able to generate their SI report.
Q1 – Q4 | Eric Leung
Project(s): Enterprise TRACS Phase 2
- Goal:** Throughout the year, apply continuous improvement to the stakeholder management module that is the core of eTRACS. This includes allowing data entry for Education, Training & Certifications, improvements for tracking awards, additional data for rank information, and usability upgrade.
Q1 – Q4 | Eric Leung
Project(s): Enterprise TRACS Phase 2
- Goal:** Throughout the year, apply continuous improvement to the course management module including course profiles, course offering profiles, 6SP and TTR Tools including exploring on opportunities for creating reports to administrative staff.
Q1 - Q4 | Eric Leung
Project(s): Enterprise TRACS Phase 2
- Goal:** Support the roll-out of eTRACS SETC processes by providing continuous system improvement in order to allow full eTRACS SETC Edits adoption by Spring 2021 term.
Q1 – Q3 | Eric Leung
Project(s): Enterprise TRACS Phase 2
- Goal:** Implement Continuous Improvement - Continuous Deployment (CI-CD) feature in eTRACS production by end of Fall 2020 to improve application performance, user experience and quality assurance.
Q1 - Q3 | Eric Leung
Project(s): Enterprise TRACS Phase 2
- Goal:** Clean and upgrade eTRACS codebase so as to improve code quality and code maintainability. In addition, the upgrades include PHP and JavaScript libraries upgrades which would ensure that eTRACS is using latest features and security patches. This is an ongoing process and multiple rounds of upgrades will be performed throughout fiscal year 2020/2021.
Q1 - Q4 | Eric Leung
Project(s): Enterprise TRACS Phase 2

Data Warehouse and Business Intelligence

The Data Warehouse and Business Intelligence (DWBI) project is essential to improving our data integration, data management, and realization of the value of our data. This year we will implement phase 2 of the student data warehouse, build tools to support the transition away from CSRPT and related systems, prepare for the decommissioning of DB2, and potentially negotiate an enterprise contract for Tableau. This year it is important to begin delivering functionality to our academic managers, while maintaining current staffing levels.

Goal: Build out the data warehouse to ensure it can meet the data reporting needs of Student Services, Institutional Research & Planning, and Graduate and Post-doctorate Studies.

Q1-Q4 | Keith Fong

Project(s): EDWBI – Student Data Warehouse – Phase 2

Goal: Replace the use cases currently solved by CSRPT with a combination of services including the Data Hub and the Data Warehouse.

Q1-Q4+ | Keith Fong

Project(s): CSRPT Replacement Project

Research Administration System

Because of the failure of the Research Ethics project and the magnitude of the project, we need to proceed cautiously forward with the development of a Research Administration System. The first step is to finalize strategic decisions including the use of PeopleSoft, the scope of the dashboard effort, and the development process for the dashboard. The structure of the sponsorship committee for the project needs to be re-evaluated for its effectiveness and its ability to manage risk.

Goal: Build a solid roadmap of deliverables and projects that all stakeholders can support.

Q1 | Keith Fong

Project(s): Research Enterprise Program – Discovery; PeopleSoft Assessment

Goal: Begin executing upon the first projects within the Research Enterprise Program.

Q1-Q4 | Keith Fong

Project(s): Compliance Solution; Project Costing and Commitment Control

eSports

With the rapid growth of eSports at US higher education institutions, we should investigate eSports opportunities in conjunction with Ancillary Services and Athletics & Recreation to understand if they improve the student experience.

Goal: *See Parking lot*

Learning Technologies

We will continue to work closely with Student Services and Facilities to upgrade learning spaces. There is also a need to conduct a formal analysis of lecture capture opportunities with recommendations for SFU-wide standards, integration with Canvas, and “YouTube” style storage an accessibility. This media work needs to be done in close cooperation the AVP of Teaching and Learning’s organization.

Goal: Prioritize lifecycle management and ever-greening for equipment and systems especially in the learning spaces.
Q1-Q4 | Sandeep Sidhu

Goal: Successfully complete all the pending projects supported by Learning space design and ESSC committees.
Q1-Q2 | Sandeep Sidhu
Projects: Learning Space design projects across the three campuses. These will need to be reviewed in light of our Pandemic response.

Goal: Converge multiple video conferencing and media management solutions into one ecosystem to support blended and online learning.
Q1-Q4 | Sandeep Sidhu
Project(s): Implementation of Zoom and decommission duplicate platforms; implementation of recording in Zoom and decommission webcasting service

Goal: Work with the Centre for Educational Excellence to implement an enterprise media library service.
Q2-Q4 | Keith Fong and Sandeep Sidhu
Project(s): Improve MyMediasite interface and architecture for media management library; improve media management service to solve current and emerging use cases

Goal: Review the need for an anti-plagiarism service and if our current solution is the optimal solution.
Q2-Q4 | Keith Fong

Enterprise Architecture

Services from our Digital Transformation Office continue to evolve and our next step is to develop an enterprise architecture process integrating data, application, and technology architects from across SFU.

- Goal:** Establish an Architecture Working Group that will collaborate on the creation of a technical current state and lead the development of a future state technology map.
Q2 | Jennifer Casey
- Goal:** Establish an Architectural Review Board that will review all Information Systems projects prior to proceeding with approval.
Q3 | Jennifer Casey
- Goal:** Create a set of technology standards to which our projects and products align and adhere.
Q4 | Jennifer Casey
- Goal:** Establish integrated processes for making technological decisions within our Project Management process to ensure compliance of our standards and best practices in collaboration with the Architectural Review Board.
Q3 | Jennifer Casey

Re-platforming of Legacy Administrative Systems

Many of our key administrative systems are old, and need investment or need to be replaced to be able to meet our community's current expectations and our future aspirations.

- Goal:** Replace the legacy Electronic Medical Records system with a modern system that will improve our throughput and quality of student care.
Q1-Q4 | Keith Fong
Project(s): Electronic Medical Records Systems (Profile) Replacement
- Goal:** Review SFU's needs for graduate student information system(s), if our current systems meet those needs, and what are some potential future solutions.
Q1-Q3 | Keith Fong
Project(s): GPS Systems Re-platforming Discovery

PeopleSoft Sustainment

Our PeopleSoft systems are the bedrock of transaction processing information systems at SFU and we expect to keep them alive and well-supported for many years to come. To ensure these systems' continued viability, we need to continue to use PeopleSoft effectively, leverage maximum value from it, and improve its usability from our clients' perspective.

- Goal:** Continue the transformation to recurring rapid upgrades to maintain vendor support.
Q1-Q4 | Keith Fong

Project(s): goSFU/FINS/myINFO PeopleSoft Update Manager (PUM) Upgrade Projects; PeopleTools 8.57 Upgrade Projects

Goal: Continue implementing new features to support university needs and priorities. Q1-Q4+ | Keith Fong

Project(s): SmartHire Implementation; Personnel Action Form (PAF) Workflow Implementation; Time & Labor Module Implementation; Replace Attendance Personnel System (Academic Personnel System); FINS SmartERP implementation; FINS Sanctions; and many others

Research Computing Support

The past few years have witnessed significant growth in research computing services to the university, including consolidation of research computing staff into a single team, construction of a new data centre, implementation of Cedar, and migration of external services into SFU (such as Triumph). As the department grows, there is increase profile and awareness of what we can do for researchers. To manage this ever-expanding demand, we need to develop a strategic plan this year for the growth of research computing support at SFU. This plan should expose the needs of researchers that are not being met, prepare for future demands, and identify areas for new investment in resources and staffing.

Goal: Accelerate research at the University through better utilization of: (1) computing resources and (2) advanced research computing (ARC) support. Q1-Q4 | Martin Siegert

Project(s): Raise awareness of Cedar as an indispensable resource to SFU researchers (Q1-Q4); Better understand local ARC needs and connect researchers to available expertise (Q1-Q4); Build expertise/capacity at SFU, e.g. capitalizing on specific funding opportunities like CANARIE (Q1-Q3); Build on international partnerships, e.g., with TACC, by leveraging expertise and knowledge and sharing of training material (Q1-Q4)

Goal: Introduce Managed Linux desktop service through the IT Service Desk. Q1-Q3 | Sandeep Sidhu

Collaboration

Enable our vision of One I.S., where all our systems work together in a seamless fashion and all the people who support those systems work together in a seamless fashion, through the development of collaborative tools, processes, and organization structures.

Academic I.S. Integration

Key to the realization of our One I.S. Vision is greater integration and collaboration with local information systems. The Academic I.S. Integration (AISI) program is a prime example of this process in action and we need to continue to build upon this model's success. Expansion of AISI includes implementing the model to more faculties and developing MOUs for all relationships, not just faculties.

Goal: Support Academic I.S. developers by increasing collaboration between different teams through shared projects, and connecting local developers with enterprise counterparts to share expertise.

Q1–Q4 | Eric Leung

Goal: Complete the first draft of Enterprise and Local IT Engagement blueprint.

Q1-Q3 | Sandeep Sidhu

Project(s): Academic IS Integration program

Goal: Complete pilot transition of Faculty of Arts and Social Sciences (FASS) and Faculty of Communication, Arts and Technology (FCAT).

Q1-Q3 | Sandeep Sidhu

Project(s): Academic IS Integration program

Project Prioritization and Scorecard Process

With over 70 active projects our existing model of First-In First-Out prioritization no longer meets our needs. We must add a formal prioritization project process and scorecard to our project management process.

The scorecard is a standard rubric designed to assess all projects equitably and comprehensively with the purpose of allowing our stakeholders to compare and assess the full breadth of our information systems investment opportunities. All active projects will be scored prior to the new fiscal year and all new projects starting in 2020/21 will require a scorecard before submission to a stewardship committee.

The prioritization process will integrate the scoring process into our project management process. As new projects are introduced, their score will be compared against existing scores. If a new project cannot be funded or resourced and its score is higher than other projects, the

appropriate stewardship committee will decide if resources or funds should be reallocated from existing to new projects.

- Goal:** Go-live with the Project Scorecard & Project Review Committee as of April 1st, 2020.
Q1 | Jennifer Casey
- Goal:** Introduce a scheduling process of comparing newly-scored projects against our current list of projects to determine when we can schedule the project based on our constrained operating model.
Q1-Q2 | Jennifer Casey
- Goal:** Create an enterprise IT Project Roadmap, Resource Plan, and Financial Report to facilitate decision making of our Stewardship Committees for prioritizing projects vs scheduling project work.
Q1-Q2 | Jennifer Casey
- Goal:** Establish a process for collecting ideas and deciding early to reduce wasted effort on low-value projects to improve our information systems and services at SFU.
Q2-Q3 | Jennifer Casey

Data Governance

This year we need to build on the foundation created by the Data Governance Policy and the creation of the Data Governance Council. A data classification policy must be developed and implemented as an operational policy and the Data Governance Council must be established as the de facto forum for discussion of all data issues at SFU. The data governance work performed here will drive greater demands for the completion of the Data Warehouse and Business Intelligence program.

- Goal:** Establish a Data Governance Office in support of the Data Governance Council and general Data Governance Program-related activities, including development and implementation of supporting Data Governance processes, as required.
Q1-Q4 | Dave Townsend
- Goal:** Create a data classification scheme.
Q1-Q2 | Dave Townsend

Project & Service Portfolio Management

We need to expand our ability to proactively plan, schedule, and transparently communicate all the work we do, including project execution, service lifecycle management, and operational

work. We need to work with our colleagues to ensure these plans are aligned with university and departmental priorities, and to be flexible enough to change as university needs and priorities change. This will help us and our colleagues optimally plan our financial and human resources.

- Goal:** Develop long term service and portfolio roadmaps for all critical services in the service catalogue. Partner with other units in Local IT and partner departments in developing and communicating our plans for our services.
Q1-Q2 | Sandeep Sidhu and Keith Fong
- Goal:** Increase Client Services involvement early on in enterprise projects and service improvement initiatives.
Q1-Q2 | Sandeep Sidhu
Project(s): Review the current project pipeline and update priorities and timelines for projects in light of COVID-19 changes at the University
- Goal:** Partner with other ITS units to understand and contribute to enterprise resource management in project planning at early stages. Confirm what projects they are doing that need our team and vice versa.
Q1-Q4 | Sandeep Sidhu, Jennifer Casey
- Goal:** Improve the accuracy of our project and system roadmaps by improving the accuracy of our estimates and to hold firm on our project management and change request practices.
Q1-Q4 | Keith Fong and Jennifer Casey
- Goal:** In collaboration with University communications and SRS close out the current Digital signage project and review the Digital signage platform
Q1 | Sandeep Sidhu
Project(s): Digital Signage project

Video Conferencing Service Improvement

SFU is a three campus University and actively expanding the physical space at each campus. The number of activities that involve multiple campuses and departments is increasing every day. We need to make an investment in implementing consistent standards in physical spaces, meeting rooms and offices along with our devices and video conferencing software.

- Goal:** Upgrade major meeting rooms across campus with simplified, self-service Video Conferencing standards.
Q1-Q4 | Sandeep Sidhu

- Goal:** Aim to have 20% of office space technologies with meeting room standards to allow consistent video conferencing.
Q1-Q4 | Sandeep Sidhu

Planning and Reporting

We need to regularly update the university community with regard to our plans and progress. With this in mind, we will publish an Annual Plan as well as quarterly and annual reports to show our progress and results.

- Goal:** Publish an IT Services Annual Plan.
Q1 | Dave Townsend
- Goal:** Publish quarterly reports within one month following each quarter.
Q1-Q4 | Dave Townsend
- Goal:** Update IT Services' Annual Report infographic and publish the report within one quarter following the end of FY2020-21.
Q4+ | Dave Townsend

Observations

	Perspective			Risk		Focus				Discipline		Horizon		
	Reactive	Proactive	Strategic	Averse	Tolerant	Admin	Education	Research	Enterprise	Process	Project	Months	Years	Ongoing
Trust														
Information Security		☐		☐					☐	☐	☐			☐
One I.S. Policy			☐	☐					☐	☐	☐	☐		
Disaster Recovery		☐		☐					☐	☐	☐	☐		
Identity	☐			☐					☐	☐	☐		☐	
Foundations														
Wireless Improvements	☐			☐					☐	☐	☐	☐		
Cedar Upgrade			☐	☐	☐			☐		☐	☐	☐		
Desktop Transition	☐			☐	☐				☐	☐	☐	☐		
Unified Communications			☐	☐	☐				☐	☐	☐	☐	☐	
Cabling Upgrade	☐			☐	☐				☐	☐	☐	☐		
Vault		☐		☐					☐	☐	☐	☐		
DB2 Decommissioning Plan		☐		☐	☐	☐				☐	☐	☐		
Organization			☐	☐					☐	☐	☐			☐
Operational Excellence			☐	☐	☐	☐				☐	☐			☐
Budget Management	☐			☐		☐				☐	☐			☐
Culture														
Townhall Action Groups & Engagement		☐		☐	☐	☐				☐	☐			☐
Job Evaluations		☐		☐		☐				☐	☐	☐		
Review Meeting Structure	☐			☐	☐	☐				☐	☐	☐		
Transformation														
Salesforce			☐		☐				☐	☐	☐		☐	
eTracs			☐		☐	☐				☐	☐		☐	
Data Warehouse & Business Intelligence			☐		☐	☐				☐	☐		☐	
Research Administration System			☐	☐		☐		☐		☐	☐		☐	
Learning Design		☐		☐			☐			☐	☐		☐	☐
eSports		☐		☐	☐	☐				☐	☐		☐	
Enterprise Architecture		☐		☐					☐	☐	☐			☐
PeopleSoft Sustainment		☐		☐		☐				☐	☐			☐
Research Computing Support			☐		☐			☐		☐	☐			☐
Collaboration														
Academic I.S. Integration		☐		☐	☐	☐				☐	☐			☐
Prioritization		☐		☐					☐	☐	☐			☐
Data Governance			☐	☐					☐	☐	☐			☐
Product & Service Portfolio Management			☐		☐				☐	☐	☐		☐	
Count	6	12	12	17	13	11	1	3	15	13	23	10	8	12

Perspective

There is a reasonable balance of proactive and strategic work. Too many reactive activities reflect a lack of planning or excess technical debt.

Risk

Risk management efforts (risk averse) are well balanced with innovation efforts (risk tolerance).

Focus

Clearly our primary emphasis is on administration and enterprise work, however many of the enterprise benefits impact education and research. We need to work with the AVP Teaching and Learning to expand our support in the education area.

Discipline

Roughly 1/3 emphasis on process (operations) and 2/3 on projects, which is likely a reasonable balance given our state of maturity.

Horizon

Too many multi-year projects can place unreasonable demands on the department, so the split among shorter efforts with faster benefits, ongoing operational benefits, and long-term deferred benefits is rational.

Priorities

1. Pandemic response
2. Information Security
3. Prioritization
4. Learning Technologies
5. Multi-Factor Authentication
6. Salesforce
7. eTRACS
8. Cedar Upgrade
9. Operational Excellence
10. Townhall Action Groups & Engagement

Parking Lot

As we remove goals from our plan due to pandemic response or other reasons, we are recording them here for future use.

- Goal:** Implement wired Port Authentication.
Q4 | Michael Thorson
Project(s): Upgrade Switch Infrastructure to support implementation
- Goal:** Implement privileged Account Management (PAM).
Q4 | Michael Thorson
Project(s): PAM after Identity Management Replacement project
- Goal:** Replace anything below CAT5e across campus (<60% of campus).
Q4 | Michael Thorson
Project(s): Cabling replacement project
- Goal:** Implement Base Monitoring.
Q4 | Michael Thorson
Project(s): Operational Excellence
- Goal:** As an extension to the SFU I.S. security standards and guidelines, develop a specific application development and infrastructure security guideline for the eTRACS development team within three months of the approval of SFU I.S. security standards.
Q3 | Eric Leung
- Goal:** Conduct a 1-year relationship management pilot in Client Services with a view to introducing consistent relationship management practices across IT Services as a whole.
Q1-Q4 | Sandeep Sidhu
- Goal:** Empower our colleagues and partners by providing a robust onboarding process for new employees as well as ongoing training sessions and workshops.
Q1-Q4 | Sandeep Sidhu
- Goal:** Introduce a mechanism for staff to collaborate for problem solving, knowledge sharing, and innovation beyond their immediate team/campus.
Q1-Q4 | Sandeep Sidhu
- Goal:** Determine creative ways to create an engaging work environment, e.g. eSports across multiple teams and campuses or creating virtual meeting rooms.
Q1-Q4 | Sandeep Sidhu
- Goal:** Formalize vendor and supplier management process with single location to manage all contracts and renewals.

Q1-Q4 | Sandeep Sidhu, Jennifer Casey, Michael Thorson and Dave Townsend