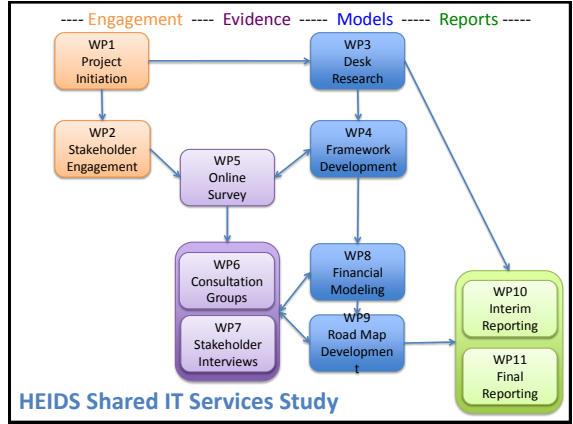


Shared IT Services Study

HEIDS working with Scotland's Colleges

ScotBUG update – 27 May 2011

David Kay
Sero Consulting



HEIDS Shared IT Services Study

Original Plan

	January	February	March	April	May	June
WP1 - Project Initiation						
WP2 - Stakeholder Engage		>				
WP3 - Desk Research	1	1		2	2	
WP4 - Framework Dev	1	1		2		
WP5 - Online Survey						
WP6 - Consultation Groups					→	
WP7 - Stakeholder Interviews		1	1	>	2	2
WP8 - Financial modelling					→	
WP9 - Road Map Dev				1	1	2
WP10 - Interim reporting						
WP11 - Final reporting					1	2
WP12 - Project Management	SG1		SG2		SG3	SG4

- ## Final HEIDS Report
- Executive Summary
 - Scope
 - Landscape (opportunities, options)
 - Road Map (3 year journey)
 - Recommended 'Projects' (std template)
 - Considerations for Institutions
 - 'Business Case Evaluation' Model
 - Appendices
 - Survey
 - Interviews
 - Desk Research in standalone report

- ## Key Questions with particular reference to Scotbug
- **Benefits**
 - Economy - Cashable savings
 - Efficiency - Service benefits
 - Effectiveness - Impact on student experience
 - **Spin offs (SAV)**
 - Supply side response
 - Inclusion of wider applications
 - Cross-fertilisation across application 'families' (e.g. BB / Moodle)
 - Motivating innovation and collaboration
 - Scottish learning landscape – a warm glow?
 - **Take up**
 - Coverage (Who's in?)
 - Costs model (Who loses?)
 - Phasing (What works?)
 - Sustainability (How long?)
 - **Vehicle**
 - Raison d'etre
 - Assure Capability
 - Build Partnership
 - Guarantee Extensibility

HEIDS Survey – Boundaries

Answer Options	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
IT infrastructure does not need to be owned by the institution	14	28	7	3	2
IT infrastructure does not need to be managed by the institution	5	28	7	10	4
Some IT support services could be aggregated across the sector	16	27	10	1	0
Some generic IT applications, such as student email, could be delivered by external services	28	23	3	0	0
The sector is too diverse to generate a shared service on a scale that would deliver dividends	1	2	17	28	6
Shared services will bring more problems than solutions to our operations	1	4	20	27	2
Shared services will lead to silos and decrease the likelihood of integrating data and services	0	9	14	31	0
Shared and outsourced services will be less flexible than local arrangements	5	22	20	7	0
Whenever the option exists, shared IT services should be based on Open Source software	2	2	28	14	8
Shared services cannot be considered in areas where there is competitive advantage	5	13	19	15	2
There is no essential differentiation to be derived from IT services – they are simply utilities that need to be top class so we can get on with our real business of teaching, learning, research and customer support	4	17	12	15	6

Where are we now? - Upstairs

- Reliable technology
- Range of service models
- Reputable exemplars
- End user acceptance
- Legal impediments
- Economic climate
- Corporate approval

Where are we now? - Downstairs

- Transformation challenges (cultural, human)
- Demonstrable business case (IT, corporate)
- VAT challenges
- Systems lifecycle (churn, term)
- And not least ... Appropriate partnerships
 - JANET UK
 - Sector (Scotland-wide, Consortium, bilateral, etc)
 - Commercial (Vendors, affiliates, etc)

Lest we forget ...

- Access Management – UK AMF, Shibboleth, Athens
- Network – SuperJANET with MANs
- Security – ESIS
- Conferencing - JVCs
- Shared Services Brokerage – JANET UK
- Library Holdings – UK Research Reserve
- Licensing – SCURL, NESLI2
- Discovery – Archives Hub, Copac, Suncat
- Repository – Jorum
- Support – JISC RSCs, JISC Advance
- Help Desk – NorMAN, Edinburgh et al
- Specialist resources – SINAPSE, UHI GIS
- Procurement – Public Contracts Scotland
- VLE - Hosted Blackboard, Moodle
- Email – Google, Microsoft
- Storage – Amazon, IBM, Microsoft, et al

Interest in SaaS for Teaching & Learning Applications

Filter
40 Key Respondents
31 scoring VLE (G3a) @ 4+
Sorted by overall
Shared Services interest

SaaS TL Apps	G3a	G3c	G3d	G3e	G11	G2e	G2g
6	6	3	6	4	6	6	
5	6	5	5	5	6	5	
5	5	5	5	5	5	5	
6	6	4	4	3	6	5	
5	4	3	3	4	4	4	
4	3	4	4	5	5	4	
5	4	4	4	5	4	4	
4	4	4	4	5	4	4	
5	5	3	4	5	3	4	
6	4	3	3	5	3	4	
6	6	1	1	1	6	6	
4	3	4	4	4	4	4	
4	4	4	4	4	6	1	
4	4	4	4	4	4	4	
5	4	4	4	4	4	4	
4	4	4	4	4	4	4	
4	4	6	6	3	1	1	
4	6	3	3	4	4	4	
4	4	4	4	4	4	4	
4	4	4	4	3	4	4	
6	3	3	3	4	4	3	
6	4	4	4	4	4	3	
4	6	5	4	4	4	4	
4	4	4	4	3	6	1	
4	4	4	4	4	1	3	
4	4	4	4	4	4	4	
4	4	3	4	4	1	4	
4	4	4	4	6	4	4	
4	4	4	4	1	3	3	
6	1	1	4	1	6	6	
4	1	3	3	1	3	4	

- G3a – VLE
- G3c - Library Management
- G3d – TLR Repository
- G3e – Multimedia Repository
- G11 – Institutional Repository
- G2e - Help Desk Management
- G2g - Student Registry

Interest in SaaS for Teaching & Learning Tools

Same Filter
40 Key Respondents
31 scoring VLE (G3a) @ 4+
Sorted by overall
Shared Services interest

SaaS TL Tools	G4b	G4c	G4d	G4e	G4f	G4g	E2e
6	6	6	6	6	6	6	5
6	5	5	5	5	5	5	5
6	5	5	5	5	5	5	5
6	6	6	6	6	6	6	3
6	4	4	4	4	4	4	5
5	5	5	5	5	5	5	5
5	5	5	4	4	4	4	5
5	5	5	4	4	4	4	5
6	4	3	4	4	4	4	5
5	5	5	4	4	4	4	5
6	6	6	4	4	4	6	5
4	4	4	4	4	4	4	5
4	4	4	4	4	4	4	5
4	4	4	4	4	4	4	3
6	4	4	4	4	4	4	5
4	4	4	4	4	4	4	5
4	4	4	4	4	4	4	5
5	5	5	5	5	5	5	5
5	5	5	5	5	5	5	5
6	1	1	4	4	4	4	5
6	5	5	4	4	4	4	3
5	5	5	4	4	4	4	5
6	3	1	3	4	4	4	3
4	4	4	4	4	4	4	4
5	3	3	3	4	4	4	3
4	4	4	3	3	3	3	3
4	1	1	4	4	4	4	5
6	1	1	6	4	3	5	5
4	4	4	4	4	4	4	3

- G4b - Student email & msng
- G4c - Staff email
- G4d - Calendar
- G4e - Desktop / productivity tools
- G4f - Collaboration tools
- G4g - Web Conferencing
- E2e - Video Conferencing

Interest in Knowledge Services

Same Filter
40 Key Respondents
31 scoring VLE (G3a) @ 4+
Sorted by overall
Shared Services interest

Kaas	F1c	F1d	F1g	F3b	G3g
5	5	5	5	5	4
5	5	5	5	5	3
5	3	5	5	5	3
5	5	5	5	5	3
5	5	5	5	5	3
3	5	1	3	4	4
3	5	5	3	4	4
5	5	5	5	5	4
5	5	5	5	5	4
5	5	5	5	5	4
5	5	5	5	5	4
5	5	5	5	5	4
3	3	3	3	4	4
5	5	5	5	5	4
5	5	5	5	5	4
5	5	5	5	5	4
5	5	5	5	5	4
3	3	3	3	4	4
3	3	3	3	4	4
3	3	3	3	4	4
3	3	3	3	4	4
3	3	3	3	4	4
1	1	1	1	4	4
3	5	3	1	4	4
5	5	5	5	5	3

- F1c - User Training
- F1d - Technical Help Desk
- F1g - Support for specialist TLR apps
- F3b - Database Administration
- G3g - Virtual Worlds

SaaS

- Email
- Calendar
- IM / Voice
- Docs
- Sites
- Forms

Free to Education
Free to Not for Profit

Live@edu Today

Office 365 for education

Plan A1	Plan A2	Plan A3	Plan A4
\$10mo Facstaff Free + Students	\$10mo Facstaff Free Students	\$14mo Facstaff \$2mo Students	\$17mo Facstaff \$5mo Students
Includes: Exchange Plan 1 SharePoint Plan 1 Lync Plan 2 Office Web Apps	Includes: Exchange Plan 1 SharePoint Plan 1 Lync Plan 2 Office Web Apps	Includes: Exchange Plan 2 SharePoint Plan 2 Lync Plan 2 Office Web Apps Office ProPlus Other Apps	Includes: Exchange Plan 2 SharePoint Plan 2 Lync Plan 2 Office Web Apps Office ProPlus Lync Plan (Voice)

Office Pro Plus
Voice
Virtual & advanced archive capabilities
Access/Exchange
Web Services
Office Web Apps
IM & presence
Collaboration w/ Sites
Conferencing
Email, calendar, APAS, Personal Archives
Exchange Plan 1
SharePoint Plan 1
Lync Plan 2
Office Web Apps

Exchange Plan 2
SharePoint Plan 2
Lync Plan 2
Office Web Apps
Office ProPlus
Other Apps

Exchange Plan 2
SharePoint Plan 2
Lync Plan 2
Office Web Apps
Office ProPlus
Lync Plan (Voice)

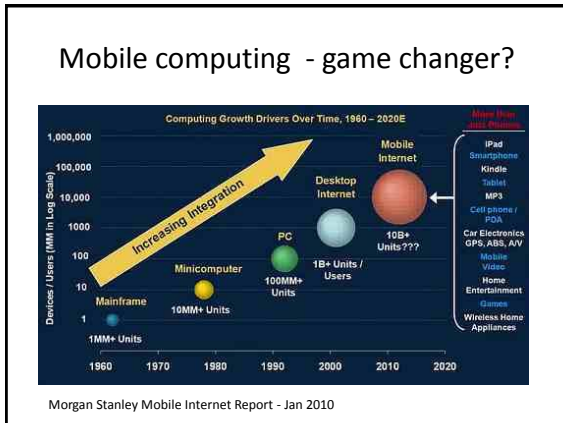
Windows Live services
SkyDrive/Office Web Apps/Messenger/etc.

Managed Hosting:
Partnering and Best Practices
to Support Education Strategy

Managed Hosting™

E-Learn Design
Scotland's Moodle Partner

University of London
Computer Centre



- ## Road Map Top 16
- SaaS – Sector specific
 - Student Records
 - VLE
 - Personal Portfolio
 - Repository
 - Licensing & ERM
 - Local Library Systems
 - Saas – Generic
 - Email
 - Office
 - IaaS / PaaS
 - Network Connectivity
 - Mass Storage
 - Backup & Disaster Recovery
 - Collaboration Infrastructure
 - KaaS
 - User Help Desk
 - Specialist Applications Support
 - Specialist Systems Support
 - Shared procurement

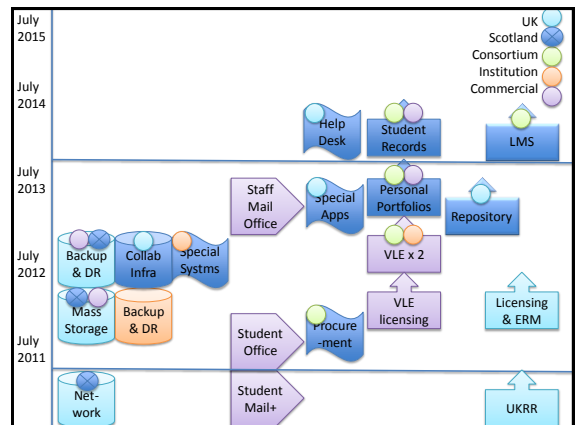
Models of Aggregation

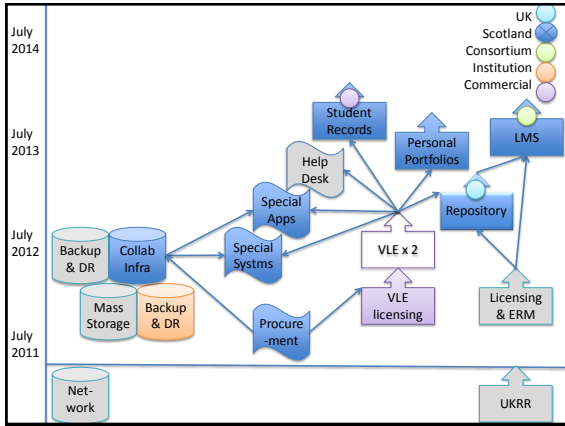
Waggener & Wheeler (2009) suggest

- Commercial Sourcing
- Institutional Sourcing
- Consortium Sourcing

In we might add

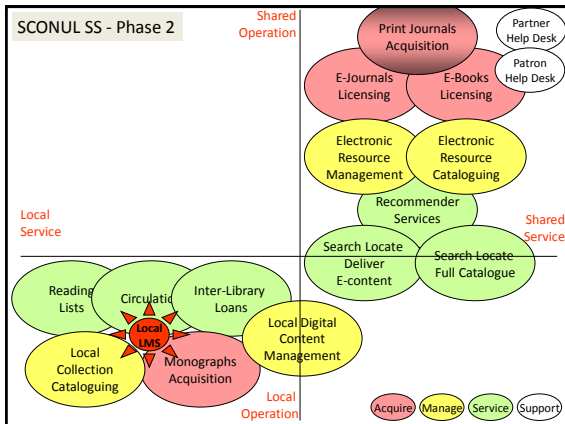
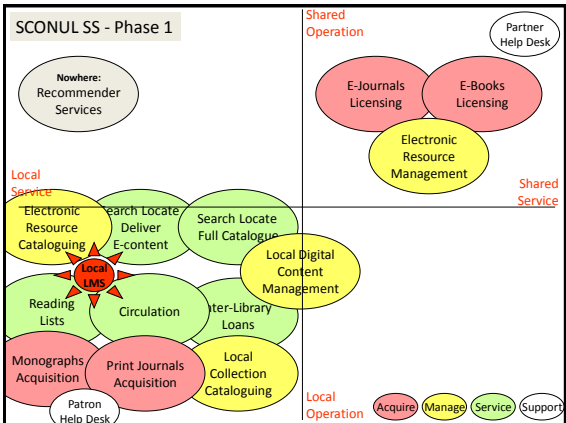
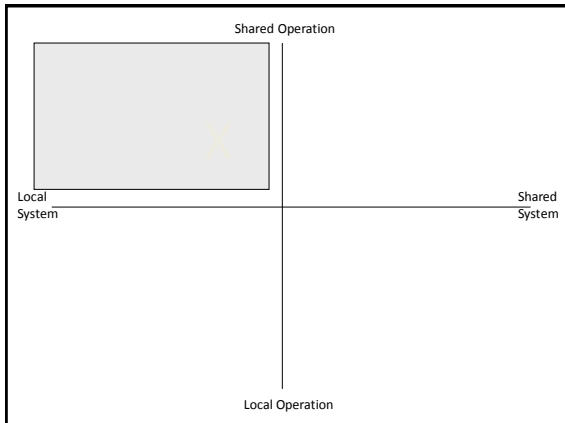
- National Sourcing
- The Scottish dimension





Service Landscape Model

Example approach from the SCONUL Shared Services Study (2009) – now a UMF funded development (2011-12)



- ### SCONUL Shared Service – What will success look like?
- Benefits
 - Cashable savings
 - Service benefits for libraries and their users
 - Wider resource access
 - Impact on behaviour of researchers, lecturers, students
 - Spin offs
 - Supply side response
 - Inclusion of wider collections
 - Motivating innovation and contribution
 - Take up
 - Coverage
 - Unit costs of access
 - Sustainability
 - Vehicle
 - Business minded
 - Reputation
 - Partnership integration

Key Questions with particular reference to Scotbug

- Benefits
 - Economy - Cashable savings
 - Efficiency - Service benefits
 - Effectiveness - Impact on student experience
- Spin offs (SAV)
 - Supply side response
 - Inclusion of wider applications
 - Cross-fertilisation across application 'families' (e.g. BB / Moodle)
 - Motivating innovation and collaboration
 - Scottish learning landscape – a warm glow?
- Take up
 - Coverage (Who's in?)
 - Costs model (Who loses?)
 - Phasing (What works?)
 - Sustainability (How long?)
- Vehicle
 - Raison d'être
 - Assure Capability
 - Build Partnership
 - Guarantee Extensibility