

UBC

IT Investment Planning and Prioritization



UBC100

THE UNIVERSITY OF BRITISH COLUMBIA

Abstract

This presentation is about the current work being done at UBC in relation to IT Investment Planning and Prioritization. It will discuss why IT investment planning is in focus at this time and factors that lead to a climate supportive of collaborative and holistic IT investment decision making. The presentation will include background on how this decision making relates within the landscape of all types of investment decisions at the institution.

Attendees will learn:

- what elements were considered when designing the process
- what elements are included in the process
- what benefits the university expects to receive
- how it fits into the overall UBC governance structure
- the high level plan for the way forward at UBC

What is Investment Planning and Prioritization?

Investment Planning and Prioritization (IP&P) is a process designed to ensure that UBC is:

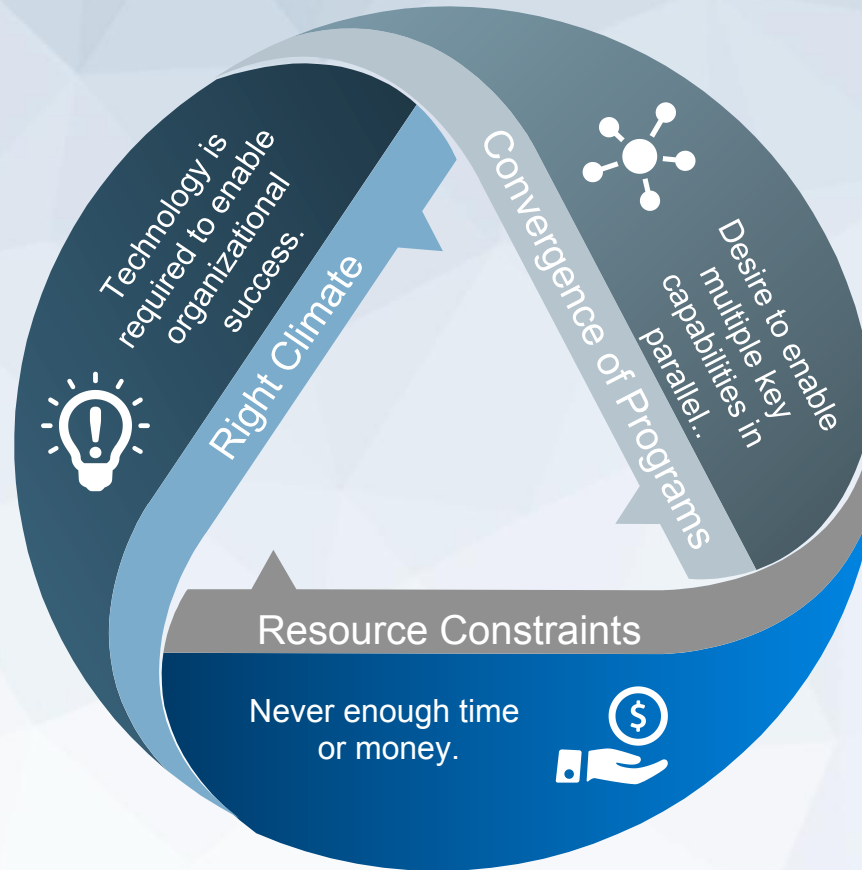


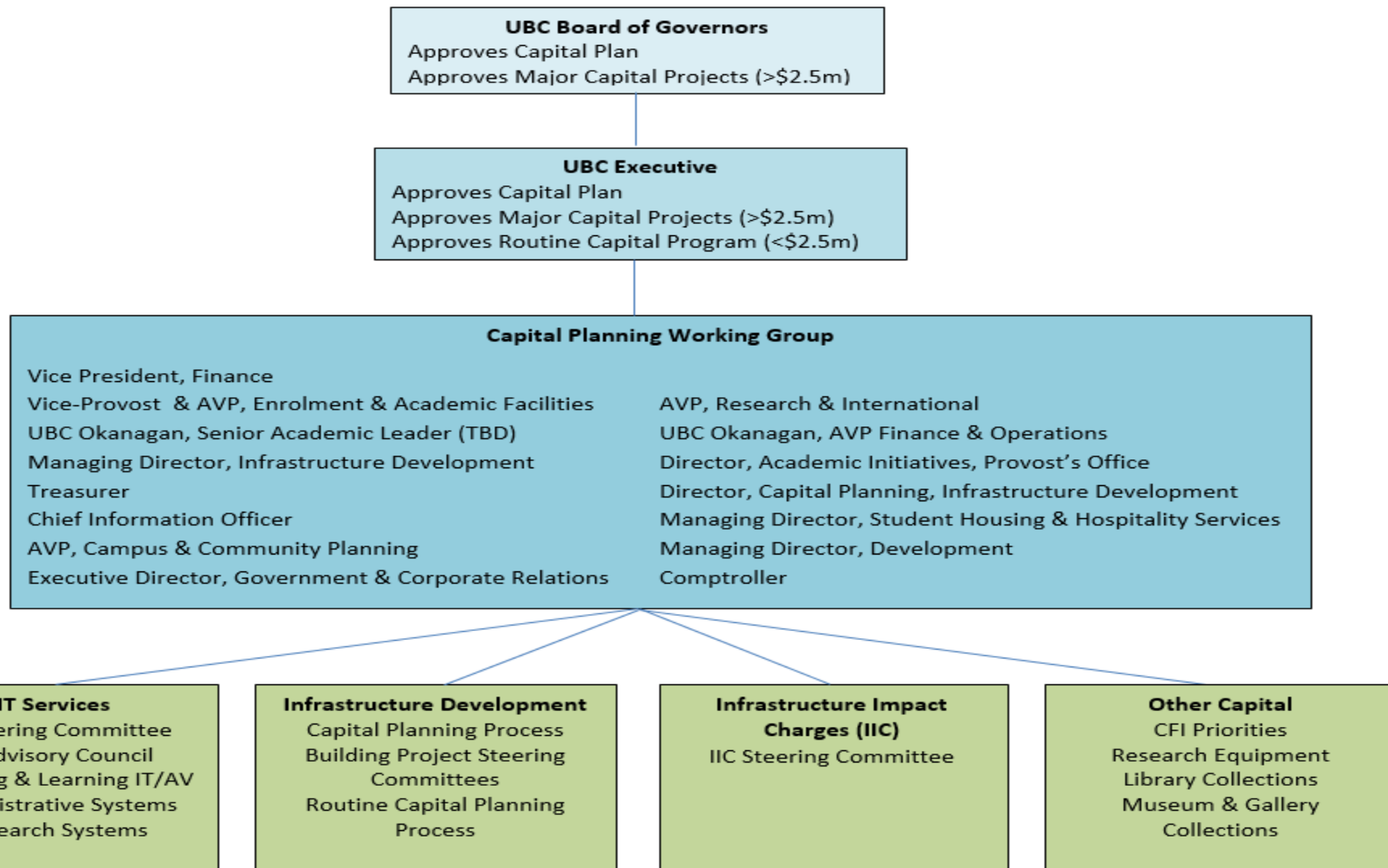
Focusing its IT efforts on the initiatives and activities that best support UBC's strategic goals and objectives.

Why Prioritize Investments?



Why is UBC doing this now?





UBC Major Capital

UBC IT

Process Alignment



Score

Prioritize

Approve

OR



Score

Prioritize

Approve

Thresholds Determine which Process

Thresholds for Approvals

	Definitions for each Factors for Approvals				
Factors	Major Capital	Large	Medium	Small	XSmall
Financial	Millions of Dollars				
Funding Model	Hybrid Funding				
Value Creation					
Risks	Mitigates a broad risk				
Issues					
Opportunities					
Scope Complexity	Highly complex				
Duration	> 3 years				

Low barrier to
entry, low
friction
throughout

Quick off ramp
for non-project
activities

Appropriate
documentation
and cadence
for approvals
based on
category sizing

Preserve what
is working well
today

How is it going to work?



Idea

UBC Major
Capital

OR

UBC IT

How is it going to work?



OR

Idea



UBC engage • envision • enable

Capital Priorities Summary

REQUEST INFORMATION	
Name of Request:	
Area	Estimate
Definition	
Description	
Location	
Program	
Funding	

UBC engage • envision • enable

High level Proposal

Date: [Click here to enter text.](#)

REQUEST INFORMATION			
Name of Request:	Click here to enter text.	Name of Requestor:	Click here to enter text.
Job Title:	Click here to enter text.	Department / Faculty:	Click here to enter text.
IT Contact:	Click here to enter text.		
Section A - Opportunity Definition			
Current Situation: <i>*Present the "as is" state: the current business model, functions, processes and tasks completed by the people involved in the processes.</i> Click here to enter text.			
Opportunity or Problem Statement: <i>*What are the key pain points within the identified business processes, the causes of problems and the opportunities targeted within these?</i>			

UBC IT

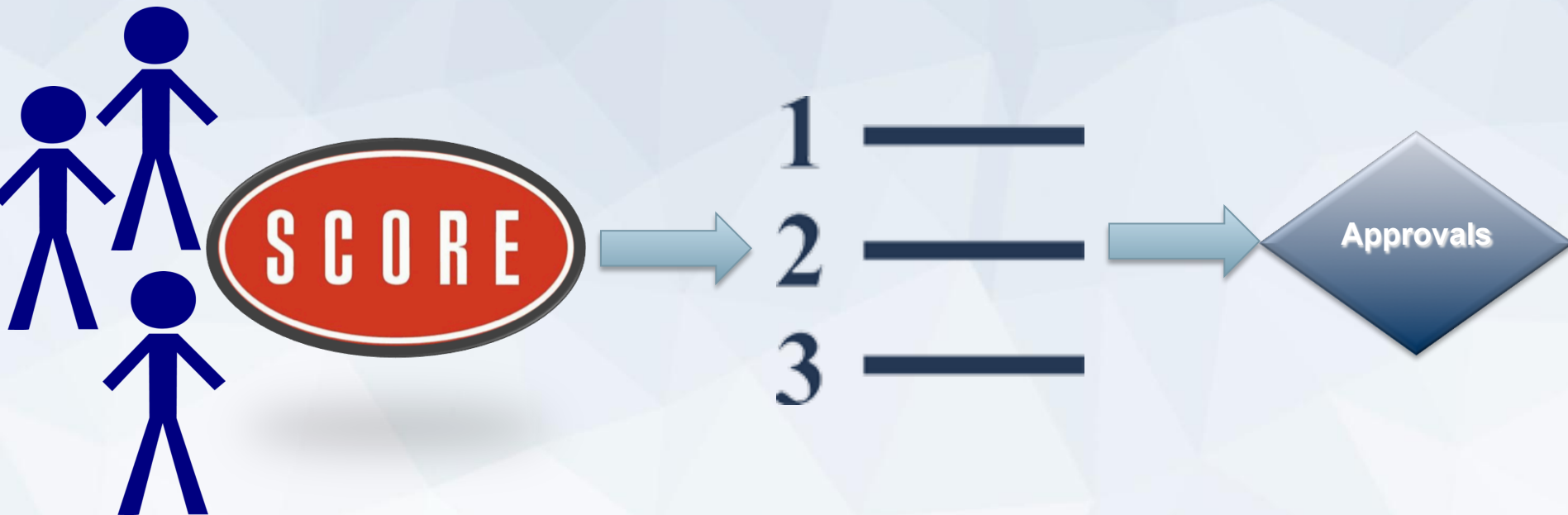
Should it go through this process?

Shouldn't go through the process



Goes through the IP&P process

Investment Planning & Prioritization Process



Who is involved in Scoring and Why?

Working Groups

- Comprised of representatives from different areas of UBC.
- Their mandate is to represent the UBC broadly in a strategic manner to ensure the priority and scoring is accomplished in a balanced way bringing many viewpoints to the table.

Who is involved?

UBC Capital Planning Working Group

Vice President, Finance	AVP, Research & International
Vice-Provost & AVP, Enrolment & Academic Facilities	UBC Okanagan, AVP Finance & Operations
Managing Director, Infrastructure Development	Director, Academic Initiatives, Provost's Office
Treasurer	Director, Capital Planning, Infrastructure Development
Chief Information Officer	Managing Director, Student Housing & Hospitality Services
AVP, Campus & Community Planning	Managing Director, Development
Executive Director, Government & Corporate Relations	Comptroller

UBC IT Working Group

Manager, Engagement & Enablement (Enterprise Architecture)	Senior Manager, Financial Management & Integrated Reporting
Manager, Learning Applications	Senior Manager, UBCNetwork & Infrastructure Facilities
Program Manager, Infrastructure	Senior Systems Analyst
Senior Client Services Manager (Applied Sciences, Nursing, Research Projects, Engineering, Research Centers, etc.)	Client Services Coordinator
Senior Manager, Business Information Systems	

How does Scoring Work?



Weighted Score Card

Key Question

What initiatives are most important to the University?

Weighted Score Card

Strategic Priorities

Students/Learning
Research
Community
Innovation
International/Intercultural

Value Creation

Mitigate a Risk
Resolve an Issue
Realize an Opportunity

Weighted Score Card

Additional Considerations for UBC IT

Can we successfully execute those initiatives?

Weighted Score Card - IT specific

Solution Scope

Duration
Deployment Footprint
Technical Complexity
Process Complexity

Execution Capability

IT Capability
UBC Capability
Joint Capability

UBC Major Capital Score card

Contribution to University Strategic Priorities - What is the return on investment (ROI) provided in these areas?				Total Weighted Strategic Score (out of 10)
Teaching & Learning	Research	Student Experience	Community Engagement	
%	%	%	%	
# students benefiting per \$ invested; program ranking and potential	Research grant \$ potential per \$ invested; research group ranking and potential	# students benefiting per \$ invested	# community members benefiting per \$ invested	

Contribution to Operational Risk Mitigation and Performance - ROI?				Total Weighted Operational Score (out of 10)	Total Overall Weighted Score (out of 20)
Health & Safety (i.e. seismic)	Deferred Maintenance/ Reliability	Legal/Regulatory/ Reputation	Operational Efficiency/ Effectiveness		
%	%	%	%		
# people benefiting per \$ invested	DM\$ reduction per \$ invested	Risk and urgency of compliance requirement	Annual \$ savings per \$ invested		

Weighted Score Card

Rating	Duration	Deployment Footprint	Technical Complexity	Process Complexity
1 Highly Complex Scope	> 4 years	Affecting all of UBC	Manipulates: <ul style="list-style-type: none"> multiple systems underlying <u>many functions</u> of the institution, that are <u>strongly co-dependent on each other AND reliant on other functions.</u> 	Results in <u>multiple interconnected</u> processes and process management changes <u>supporting critical university Capabilities</u> , requiring substantial engagement and process redesign.
2 Moderately Complex Scope	2 - 4 years	Affecting all operations of a single <u>campus</u>	Manipulates: <ul style="list-style-type: none"> multiple systems underlying <u>multiple functions</u> of the institution, that are <u>strongly co-dependent</u> on one another. 	Results in <u>multiple independent</u> processes and process management changes to <u>critical university Capabilities</u> , requiring significant engagement and process redesign.
3 Complex Scope	1 – 2 years	Affecting a <u>cluster</u> of Faculties OR administrative departments	Manipulates: <ul style="list-style-type: none"> <u>multiple systems</u> underlying a single function of the institution, that is <u>strongly dependent</u> on other functions. 	Results in <u>multiple independent</u> processes and process management changes to <u>non-critical</u> university Capabilities, requiring minimal re-design.
4 Moderately Straightforward Scope	6 – 12 months	Affecting a single <u>Faculty</u>	Manipulates: <ul style="list-style-type: none"> a single system underlying a single function of the institution, that is <u>strongly dependent</u> on other functions. 	Results in <u>a small</u> number of changes to well defined processes, requiring low levels of engagement and re-design.
5 Straightforward Scope	< 6 months	Affecting a single academic or administrative <u>department</u>	Manipulates: <ul style="list-style-type: none"> a single system underlying a single function of the institution that is <u>relatively</u> independent on other functions. 	Does not require changes to existing business processes and the technical changes are largely invisible to users.

Weighted Score Card

Rating	Duration	Deployment Footprint	Technical Complexity	Process Complexity
1 Highly Complex Scope	> 4 years	Affecting all of UBC	Manipulates: <ul style="list-style-type: none"> multiple systems underlying <u>many functions</u> of the institution, that are <u>strongly co-dependent on each other AND reliant on other functions.</u> 	Results in <u>multiple interconnected</u> processes and process management changes <u>supporting critical university Capabilities</u> , requiring substantial engagement and process redesign.
2 Moderately Complex Scope	2 - 4 years	Affecting a significant portion of UBC	Manipulates: <ul style="list-style-type: none"> multiple systems underlying <u>many functions</u> of the institution, that are <u>strongly co-dependent on each other AND reliant on other functions.</u> 	Results in <u>multiple interconnected</u> processes and process management changes <u>supporting critical university Capabilities</u> , requiring substantial engagement and process redesign.
3 Complex Scope	1 - 2 years	Affecting a significant portion of UBC	Manipulates: <ul style="list-style-type: none"> multiple systems underlying <u>many functions</u> of the institution, that are <u>strongly co-dependent on each other AND reliant on other functions.</u> 	Results in <u>multiple interconnected</u> processes and process management changes <u>supporting critical university Capabilities</u> , requiring substantial engagement and process redesign.
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Rating x Weight = Score

Priority

Score

1 —
2 —
3 —

Dependencies

Expert Knowledge

Industry Trends

Legislated or Legal Requirements

Donor Priorities

Provincial and Federal Considerations

Different Lenses

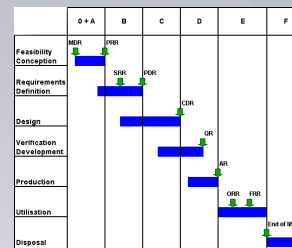
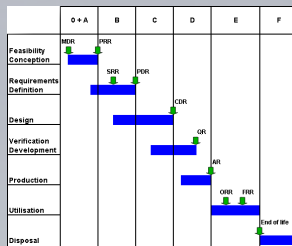
UBC Lens

IT Lens

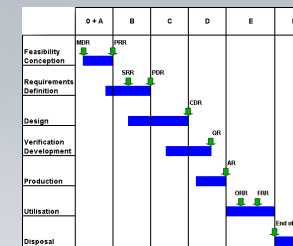
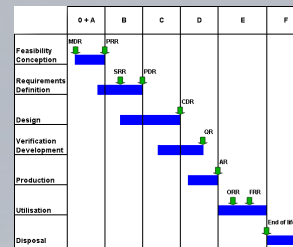
Building Lens

Research Lens

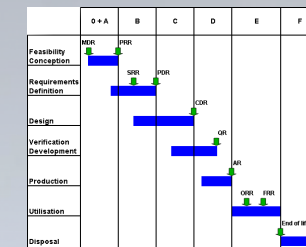
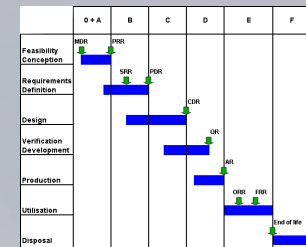
UBC IT Projects



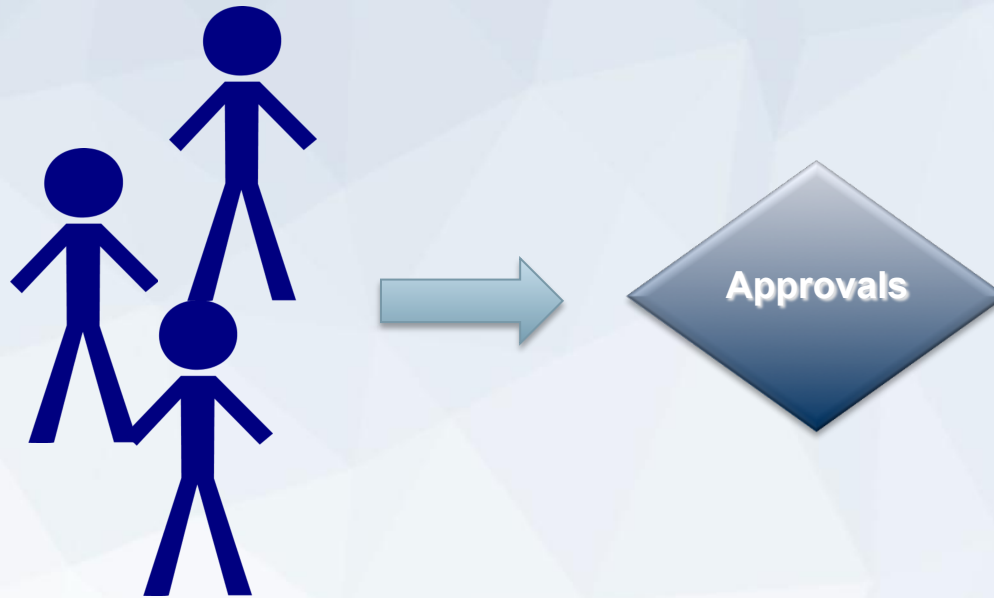
Building Projects



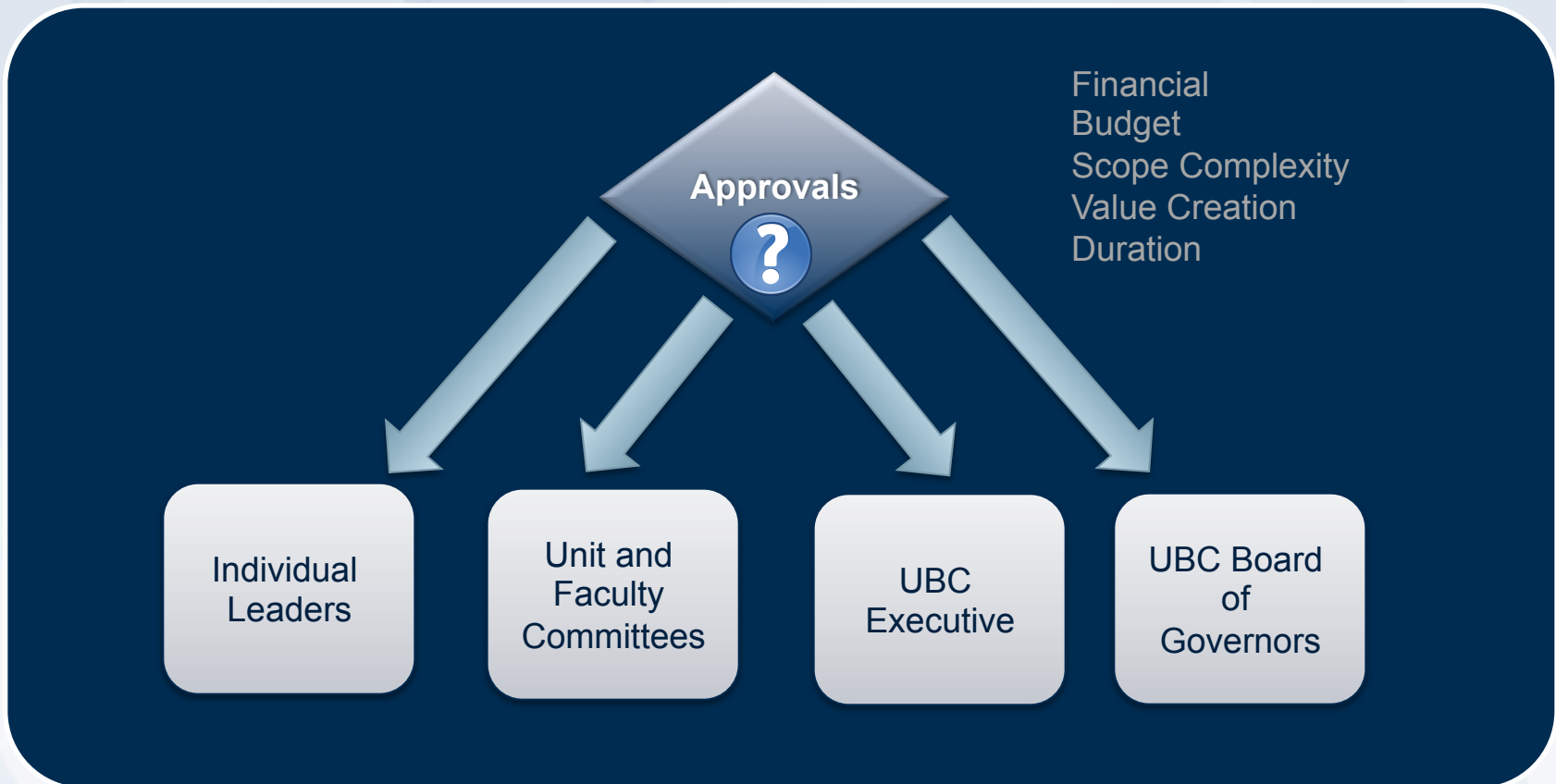
Research Projects



Approvals



Approval Flows



Challenges

- Distributed nature of the university makes it a challenge to socialize any new processes.
- Acceptance of the process as a valuable step vs. as a bureaucratic low value layer.
- Ensuring that the most appropriate decision makers/approvers are engaged and supported in the process.
- Ensuring that working group members have enough protected time to do the necessary work.
- Logistics of having working groups and decisions makers meet in a timely and consistent fashion.

Overall plan going forward



Panel discussion next year?



Contact: Angela Smith (angela.smith@ubc.ca)



a place of mind

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