

**UNIVERSITY OF OREGON
INFORMATION TECHNOLOGY
CHARTER / AGREEMENT**

**Partner Units:
Information Services and UO Libraries**

DRAFT ONLY: VERSION 2/1/17

EXECUTIVE SUMMARY

This Charter documents the portfolios held by the University of Oregon's central information technology (IT) unit called "Information Services" (IS) and the UO Libraries. IS and the Libraries have been recognized by the University as central units leading, managing, and providing major components of the University's information technology (IT) infrastructure and services.

As part of a strategic change to improve effectiveness and gain efficiencies, many decentralized IT functions and operations throughout the University will be reorganized to report centrally to either IS or the Libraries. This Charter serves as a foundation upon which both units can work toward better meeting institutional IT goals and objectives.

In the agreement, IS retains its existing IT leadership role and portfolio which includes: the provision of central IT strategic planning; technology infrastructure services; enterprise infrastructure services; information security; identity and access management; and application management, development, and integration. IS will take on new duties associated with consolidation of IT infrastructure and services now distributed in the Colleges and Schools, and consolidation of technology support services ("IT Help Desks"). New IS responsibilities will also include management and operation of the campus's open computer labs, academic computer labs, videoconferencing services, and specialized computer labs. Due to its deep integration of online education and proctoring services, as well as discipline-specific data management support and services, an exception to this rule is the Social Sciences Instructional Lab (SSIL), which will be placed into the Libraries' portfolio.

The Libraries retains its existing functions and resources associated with providing leadership, support, and services for users of the library technology and academic technology functions, including: library systems and platforms; digital collections, scholarship, and publishing; research data services; educational technology services, audio-visual/media services. Systems and services managed by the Libraries directly support students, faculty, and staff, and enable them to successfully engage in and complete mission-critical academic pursuits (i.e., teaching, learning, research), and/or support the creation, management, and curation of digital collections and exhibits. To a lesser extent, the Libraries also supports the University's public-good mission in the services provided to and the engagement with the surrounding community.

The Libraries will migrate to IS the oversight and management of open computer labs in the EMU and McKenzie Hall, but will assume responsibilities related to the Social Sciences Instructional Lab (SSIL).

Other technology-intensive central units, such as the Office for Research and Innovation (OVPRI), and UO Communications (UComm), are included in this document for context. See *Collaboration* below. Research units with grant and gift funding are outside the scope of this charter.

Three areas of IT infrastructure and work have been identified as collaborative partnerships between IS and the Libraries, and OVPRI and UComm as needed. The three areas include: web applications development; storage; and library technology infrastructure and support.

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WORKING DRAFT

UNIVERSITY OF OREGON INFORMATION TECHNOLOGY CHARTER / AGREEMENT

Partner Units: Information Services and UO Libraries

DRAFT ONLY: VERSION 2/2/17

The detailed information technology (IT) role, scope, and responsibilities of Information Services (IS) and UO Libraries are described in this Charter. While each unit is primarily responsible for the services and functions listed below, all units are responsible for working together, when applicable, to deliver such services to the University of Oregon.

Administrative Functions

Each service provider will be responsible for their own administrative functions and staffing related to

- management and general operations responsibilities (HR management, financial planning, project management and resource allocation, vendor contract management, procurement and inventory management, etc.) for their respective domain areas
- staff affiliated with these functions (including administrative, clerical, and support)
- unit-level policy development, dissemination, and application.
- IT training, communications and publications including user documentation and general informational publications and related staff.
- Space and facilities service requests; work orders for associated space on campus.

Living Document and Regular Review: This Agreement is subject to review every two years, with mutually-agreed upon updates and modifications. The review provides an opportunity for partner units to refine the Agreement as needed to reflect current goals, objectives, and management strategies.

Principles

In centralizing IT service providers on campus, going from 18 units to 2, we will have critical mass in two areas. Each of these units are charged with a different focus with sufficient efficiency, sufficient ability, and sufficient agility to deliver these services. Working closely together as partners, the two units will

- work collaboratively to identify service owners;
- partner such that each unit and its staff can contribute their respective strengths to the overall service delivery;
- support each other in ensuring that these services are delivered best to our constituents;
- work together to identify and utilize cross-functional resource teams where appropriate to provide services across domain areas

Accessibility: Units will conduct accessibility testing and provide accessibility-related solutions for applications, websites, and other interfaces as appropriate in respective domains.

CONTENTS

I.	Information Services	pp. 4-7
II.	UO Libraries	pp. 7-10
III.	UO Libraries / IS Collaborations	pp. 10-11

Technology-Intensive Central Units

IV.	Office of Vice President for Research & Innovation	p. 11
V.	UO Communications	pp. 11-12

I. Information Services

Functions and resources associated with providing general support for the institution that is not specific to teaching and learning, scholarship or research applications. Generally, services included in this domain are intended to be used by any user (faculty, students and staff).

1. Institutional technology planning and strategy
2. Technology policy development, dissemination, and application (working closely with IT Steering Committee, central administration, general counsel, registrar, UO Libraries, and Research)
3. Executive IT support
4. Centralized desktop/endpoint computing (including technical support, analysis, and consulting)
5. Hardware and software to support desktop/endpoint computing (including desktop applications for information security (e.g. anti-malware, virus detection, anti-phishing, etc.)
6. User support services (including support center and/or help desk and/or knowledge base/self-help tools)
7. Computer installation
8. Departmental computing support
9. Technology research and development specific to this domain area

Exclusions:

1. Library desktop/endpoint computing management; library hardware/software support; library user support services; library computer installations; and support for the library domain.

A. Technology Infrastructure Services

1. Research storage infrastructure and archive storage infrastructure
2. Internet2 network services
3. Wire and cable infrastructure for data, voice and/or video networks

4. Campus data network
5. Wireless network
6. Remote access (VPN)
7. Commodity Internet
8. Network management (including: capacity planning, performance monitoring, change management, etc.)
9. IPv6
10. Unified communications and collaboration
11. Telephone Services (VoIP or conventional)
12. Session Initiation Protocol (SIP) trunking
13. Voicemail
14. Cellular and paging services
15. Telecommunications (consulting, design)
16. Cable TV
17. Network, phone, and cable TV delivery and operation in residence halls in conjunction with University Housing
18. Digital signage software server (Four Winds)
19. Digital signage (Training, User Support)
20. Digital signage hardware (Training, User Support)
21. E-mail for faculty, staff, or students
22. Calendaring
23. Video and web conferencing
24. Infrastructure for communication and collaboration technologies (e.g. Listserv, SharePoint, shared web browsing, Google Docs, MS OneDrive)
25. General academic and open computer labs

Exclusions:

1. Specialized labs (visualization labs, Makerspaces, data support labs, GIS labs, etc.) that provide academic technology services for all UO constituents. – *See II. UO Libraries*
2. Specialized support centers and facilities (e.g. audio preservation, digitization labs, or facilities that support the use of specialized hardware or software. - *See II. UO Libraries*
3. Social Sciences Instructional Lab (SSIL) – *See III. UO Libraries / Information Services Collaborations*

B. Enterprise Infrastructure and Services

Functions and resources associated with developing, managing, and operating the core IT infrastructure for the institution. Core infrastructure includes data centers, servers, storage, databases, etc. as outlined below.

1. DHCP and DNS
2. Enterprise storage
3. Enterprise systems administration, operations, system backup and recovery, servers
4. Data center, operations
5. Data center environmental support systems such as HVAC, UPS and backup power supply, and systems monitor in partnership with Campus Operations
6. Virtual desktop infrastructure
7. Infrastructure as a service (IaaS) contract management

C. Information Security

1. Security planning, design and implementation
2. Security policy and process development
3. Security consulting
4. Coordinating response to security incidents or inappropriate use of information or information technology per the Acceptable Use Policy
5. Vulnerability analysis
6. Security infrastructure development and support
7. Intrusion detection and prevention
8. Secure computing
9. Network perimeter detection
10. Network behavior analysis
11. Security information and event management (SIEM)
12. Server- or system-level anti-malware, virus detection, and/or anti-phishing solutions
13. Security awareness and training programs

D. Identity and Access Management

1. Identity Management Enterprise Solutions
 - a. Authentication services
 - b. Account administration (including account provisioning and de-provisioning)
 - c. Authorization services
 - d. Directory services
 - e. Single sign-on
 - f. Federated identity
 - g. Password management
 - h. Identity management

E. Application Management, Development, and Integration

1. Administrative/business applications including:
 - a. Enterprise decision support (e.g. business intelligence and analytics, data warehouse, data integration, etc.)
 - b. Enterprise Resource Planning including:
 - i. Human Resources
 - ii. Payroll
 - iii. Finance (accounting, accounts payable, fixed assets, grants, purchasing)
 - iv. Accounts Receivable
 - v. Student information systems (including admissions, financial aid, advising, registration, student records, course and degree information)
 - c. Degree Audit and Course Transfer
 - d. Lifetime engagement application systems (CRM) and other mass communication technologies
 - e. Job scheduling
 - f. Room scheduling and events management
 - g. Document/content management and workflow systems
 - h. Auxiliary systems (e.g. housing, dining, travel management systems, etc.)

2. Web application, web services, API development specific to this domain area
 - a. Data and process integration
3. Web support services dedicated to this domain area including:
 - a. Content management application infrastructure (i.e. managing Drupal environment and UO Blogs)
 - b. Web application management and administration
 - c. Content Delivery Network (CDN)
4. Collaboration software
 - a. wiki
5. Application support including:
 - a. Implementation and support of these systems
 - b. Mobile interfaces for these systems
 - c. Training of users of these systems
 - d. Programming support related to these systems
 - e. Business process/systems analysis specific to this domain area
6. Application data management
7. Application database administration
8. Middleware development, management, and support

Exclusions:

1. Learning management systems, applications, integrations (*see II. UO Libraries*)
2. Library systems and application development in support of library and academic technology (*see Section II. UO Libraries and Section III. UO Libraries/Information Services Collaborations*)

II. UO Libraries

Functions and resources associated with providing support and services for users of the library and academic technology organization. Systems and services managed by the library directly support students, faculty, and staff, and enable them to successfully engage in and complete mission-critical academic pursuits and/or support the creation, management, and curation of digital collections and exhibits. To a lesser extent, the Libraries also supports the University's public-good mission, in the services provided to and the engagement with the surrounding community and general public.

A. Library Technologies and Systems

Functions and resources associated with developing and managing systems and technologies required to support the full domain of library and academic technology systems and services.

1. Library platforms and systems, e.g. integrated library system/library management systems, proxy services, interlibrary loan applications, etc. Some of these systems are managed collaboratively with the Orbis Cascade Alliance and other partners.
2. Digital asset management and repository systems, including applications for the campus institutional repository, e.g. Scholars' Bank, for archival materials and

collections, digital collections, e.g. Oregon Digital. Some of these systems are managed collaboratively with partner libraries and/or the Orbis Cascade Alliance.

3. Advanced visualization hardware, software support.
4. Makerspace hardware, software and support.
5. Campus pay for print application, currently Pharos.
6. Public computing and classroom computing in all branches of UO Libraries.
7. Specialized room scheduling and event management for library and academic technology spaces.
8. Application/API development, programming and services required to support library, academic technology, and digital scholarship projects.
9. Web support services for library and academic technology projects including
 - a. Content design and web-based publication;
 - b. Content management support
 - c. Web server/application support
 - d. Web-based applications design and interface
 - e. Mobile application design and development
 - f. Application/API development
10. Desktop computing/endpoint computing and peripherals supporting library and academic technology systems, services, staff, and facilities.
11. Server and system administration, operations, backup and recovery specific to library/academic technology domain functions.

B. Educational Technology Services

Functions and resources associated with and specific to supporting teaching and learning at the institution.

1. Instructional technology support and faculty development, including:
 - a. Instructional support staff, technologists and designers
 - b. Instructional technology used by faculty, including learning management system, integrations, and support, e-portfolios, assessment systems, etc.
2. Enterprise learning management systems
3. AV design, engineering, installation, and support
4. Library classroom and event management/support
5. Special initiatives and projects supporting and/or transforming instruction (e.g. accreditation and assessment projects, Open Educational Resources, LTI integration, and other initiatives in partnership with Academic Affairs, Teaching Engagement Program, Science Literacy Program, and schools/colleges, etc.)
6. Specialized training for faculty and students in instructional technologies and digital scholarship

7. Distance education, e-learning, online learning and/or hybrid learning support and related technology (e.g. proctoring and assessment software).
8. TV production and broadcasting.
9. Specialized support centers and facilities in the UO Libraries or assigned to the UO Libraries (e.g. audio preservation, digitization labs, or facilities that are support use of specialized hardware or software).
10. Learning analytics (likely in collaboration with IS and other campus partners).
11. Assessment and Scantron services

C. Digital Scholarship, Publishing and Research Data Services

1. Research data management (in collaboration with OVPRI, IS for storage...)
2. Large-scale research data management support and services, e.g. SHARE, ICPSR, SSIL, etc.
3. Specialized labs (visualization labs, Makerspaces, data support labs, GIS labs, etc.) that provide academic technology services for all UO constituents. This also includes the Social Sciences Instructional Lab (SSIL), due to its deep integration of online education and proctoring services, as well as discipline-specific data management support and services.
4. Data presentation, archiving, and stewardship.
5. Authoring teaching and learning objects
6. R&D consultation, training in support of library and academic technology services.
7. Digital scholarship and publishing systems, production, and workflows (e.g Open Journal System, open-access journals, media asset management systems, etc.) associated with the Libraries'/academic units' scholarly communication, faculty creative/research pursuits, educational purposes, and library-related needs, including support for the design, production, deployment, discoverability, and preservation of content in audio, still image, animation, video, and interactive formats, often in combination with text.

Exclusions: Research data storage, support, and computing services covered in IV. Office of the Vice President for Research and Innovation.

D. Digital Collections and Publishing Services

1. Digital collection curation, production, description, and access.
2. Information standards systems, expertise, etc., needed to support and manage metadata and discovery of scholarly communication, library collections, and digital objects.
3. Digital preservation.
4. Media production.

5. Digital library leadership.
6. Institutional repositories.
7. Electronic journal publication (usually open-access)
8. Electronic theses and dissertations.

III. UO Libraries / Information Services Collaborations

Some functions and services are most efficiently and effectively provided in collaboration. To best serve the best interest of the faculty, staff, and students of the University, Information Services and the UO Libraries will partner to deliver these services in such a way that each will be positioned to apply their respective professional expertise and work together in cross-functional teams.

A. Web Applications Development

Recognizing that both IS and the UO Libraries have their respective specialized web application development needs, each unit will have its own specialized developers on their staff. IS provides web applications development services that support business, finance, operations, data integration, and compliance. (UO Communication manages the UO Web site and provides content management and user experience design services for University level, school/college, departmental and/or general UO Web sites). UO Libraries specializes in web application development that supports and strategically furthers library domain functions, including collection development, preservation, discovery and access of library collections, digital humanities and scholarship, online learning, and teaching and learning. Programmers from both units will meet as a cross-functional unit to collaborate on shared projects, thus allowing each unit to contribute their expertise and strengths to shared projects. Details of the cross-functional partnership will be worked out by two managers: one manager (TBD) each from both IS and the UO Libraries.

B. Storage

The UO Libraries and Information Services has signed a memorandum of understanding in which Information Services provides storage to the UO Libraries. The University is exploring a university-wide storage system.

C. Library technology infrastructure and support

Technology is deeply embedded in every aspect of the Library's vision, mission, and philosophy of service; as information professionals, librarians and library staff have a deep reliance on in-house technology expertise, which allows it to lead and develop specialized and/or innovative information systems, software, and interfaces required in the library environment. To most effectively and efficiently support the information needs of this campus, the UO Libraries will manage its own server environment, image and manage desktops/endpoint computing, and provide computing support for its own

staff and faculty as well as in all UO Libraries branches and facilities. The UO Libraries collaborates with Information Services in procuring standards-based hardware and software and relies on centrally-provided imaging services such as SCCM and Casper.

Technology-Intensive Central Units

IV. Office of the Vice President for Research & Innovation (OVPRI)

Functions and resources associated with and specific to supporting research at the institution.

1. High Performance Computing, which includes
 - a. central research clusters
 - b. performant storage
 - c. networking (in partnership with Information Services)
 - d. Research computing facilitation including HPC-specific education and user training
2. Research grant compliance
3. Research data support (in partnership with UO Libraries)

Exclusions: Statistical consulting; research services provided and funded by centers, institutes and other grant-funded units that are out of scope for Transform IT.

V. UO Communications

UO Communications will be responsible for institutional web communications for the University. As a technology intensive central unit, UO Communications routinely may provide the following services as related to digital communications:

1. Institutional-level web support services and training
2. Content design and web-based publications
3. Support for content management systems: design & content
4. Web content development or interfaces
5. Coordination and development of common user experience standards and tools integrating with central services where possible
6. UO Mobile application design and development in coordination with other departments (e.g. Campus GIS and Mapping for UO Mobile App)
7. Communication strategy and oversight for social media, media relations, official university communications
 - o Training and consultation in best practices including marketing and communications analytics
8. Video production and photography for marketing and communications

Exclusions:

1. Web support services, user experience/usability functions, programming, platforms, applications development/management, content, or publications associated with scholarly communication, faculty creative/research pursuits, educational purposes, and library and academic technology-related needs (*see Section II. UO Libraries*)
2. Content Delivery Network (CDN) administration (*see Section I. Information Services*)

Signed:

_____ Date: _____
Scott Coltrane, Provost

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