

September 26, 2008

Divisional Liaison Brookie
Manager Duisenberg
Director Hall
Director Logan
Acting Assistant Vice Chancellor Matthews
Assistant Director McLean
Assistant Dean Sonnenberg

Dear Colleagues:

We are writing to request your participation on the Information User Funding Model Implementation Team (IUFMIT), a campus advisory group that will provide oversight and feedback on the implementation of the 08-09 Information User (IU) funding model.

This group will include ITS and Planning and Budget staff, as well as members of the Funding Model Advisory Group (FMAG) which developed and recommended the IU model. Naomi Gunther, an ITS project manager will support the group.

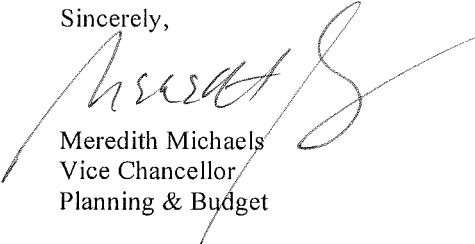
We ask that your group meet monthly (or as needed) to review a range of topics associated with the IU implementation, including policy, service definition and other issues that may emerge. A draft advisory charge and timeline is attached to help guide group work and discussion. We ask that the *IUFMIT* report regularly to us with status on key 08-09 implementation issues and anticipated adjustments for the 09-10 IU model.

As part of your role in this group, we specifically request that you communicate progress and next steps to key groups of which you are members, including the Assistant Deans and Campus Academic Support (CAS) groups. Your doing so will facilitate campus-wide discussion and input on relevant matters.


The *IUFMIT* will serve as the primary review body for the 08-09 and 09-10 IU model implementation.

We look forward to working with you on this important campus effort, and thank you, in advance for the time you will be dedicating to this group.

Sincerely,



Meredith Michaels
Vice Chancellor
Planning & Budget



Mary Doyle
Vice Chancellor
Information Technology

Cc: Campus Provost/EVC Kliger
Deans
Vice Chancellors
Vice Provosts
Campus Librarian
Assistant Vice Chancellor Eckert
Principal Analyst Lawson
Director McCue
Project Manager Gunther

DRAFT: 08-09 Information User (IU) Funding Model Implementation Team

Advisory to:	Vice Chancellors Mary Doyle and Meredith Michaels
Chaired by:	TBD
Meetings:	Monthly or as needed

Charge:

The IU Funding Model Implementation Team provides oversight to the implementation and review of the 08-09 Information User (IU) funding model. The group reviews and advises Vice Chancellors Doyle and Michaels on revisions to the following specific elements of the IU funding model:

- IU service criteria
- Eligible IU Services List
- Proposed IU Services and service changes
- IU Population Definitions and Weights
- IU Cost Recovery Model and IU Reserve

In addition, the team will inform broader IT advisory groups regarding the campus investment in IU services and the inherent trade-offs that exist in making IU service portfolio and service level adjustments. Any changes to the IU model will be guided by the following principles:

- The process to establish priorities for IT investment and support for the campus will be open and collaborative.
- All units benefit to some extent from the central IT infrastructure and all share in its cost.
- The model should improve predictability about IT charges to the divisions.
- The model should improve accountability and linkages between funding and service requirements.
- The model should create a rational mechanism for determining campus investment in shared IT services.

Planning Timeline for 08-09 Fiscal Year, recognizing the uncertainty of the UC and campus budgets:

- **August-December**: Monitor and evaluate 08-09 IU implementation; begin 09-10 IU service evaluation activities
- **December**: Propose new services, to be included in, or existing services to be retired from IU for fiscal year 09-10, to Vice Chancellors Michaels and Doyle.
- **Late January**: With input and direction from the EVC, Information Technology Services (ITS) and Planning and Budget (P&B) vet proposed IU service changes for the next fiscal year through various stakeholder groups.
- **February**: Based on campus input, present trade-offs regarding IU service changes and overall resource constraints to the broader IT advisory structure for recommendations to keep investment in IU services consistent with campus priorities.
- **March**: Review recommended changes and outline the associated impact to the IU assessment for the following situations:
 - Annual changes to service definitions and service levels for IU services
 - Removal of a service from IU either through termination, or changing the service's funding mechanism to core or recharge.
 - Adjustment to IU population definitions and weights
- **April-June**: Following the March review, ITS and P&B carry out the necessary operational actions to effect these and any EVC approved IU service changes as part of the overall campus budget process .