

CSG Agenda

Weds, May 13th

- 9:00 – 9:45 Context setting, definitions, deliverables and review survey results– Chuck Powell (Yale)
- 9:45 – 10:30 Table-top – shared Cyrus implementation -- Discussion of technical & administrative issues – Joel Smith (CMU), Michael Mundrane (Berkeley), Tom Dopirak (CMU)
- 10:30 – 11:00 Break
- 11:00 – 12:00 Legal and risk implications -- Discussion of the legal issues that arise from shared services and as service providers– Brad Wheeler (Indiana) and Joel Smith (CMU)
- 12:00 – 1:00 Lunch
- 1: 00 – 1:15 Organizing and Outcomes for Working Group Sessions
- 1:15 – 3:00 Working groups as Break-out Sessions I — Focused dive into a prospective shared service. In each case we have at least one institution willing to offer a service and multiple institutions considering outsourcing that same service. The goal in each working group will be to roll up our sleeves and determine whether there is a candidate shared service offering and on what terms, i.e., basic service definition/SLA, candidate provider(s) and subscriber(s), and assessment of readiness to contract for services within 3 months, 6 months, 12 months, 18 months, etc.) {Participants choose from}
- i. Microsoft Exchange environment (Dennis Cromwell, Indiana)
 - ii. Mobile App (Ann Duin, Minnesota)
 - iii. Calendar and/or Event Calendar (Chuck Powell, Yale)
 - iv. Shared data center/hosting/storage (Ron Kraemer, Wisconsin)
 - v. Emergency/Continuity services (emergency website, DNS services, email backup) (Shel Waggener, Berkeley)
- 3:00 – 3:30 Break
- 3:30 – 5:00 Outcomes and report out from Working Groups — Tracy Futhey (Duke)

Thurs, May 14th

- 8:00 – 8:30 Point - Counterpoint – Cloud Computing... Reality or Hype? (Bill Clebsch, Stanford, Elazar Harel, UC San Diego)
- 8:30 – 9:00 Point - Counterpoint – Shared Software Development... Evolution versus Revolution
- 9:00 – 9:45 Community Services – Two specific projects/proposals
1. dSpace/Fedora – DuraCloud – Sandy Payette
 2. I2 – InCommon and coMANAGE -- Ken Klingenstein
- 9:45 – 10:15 Break
- 10:15 – 12:00 Working Group Breakouts II — Focused dive into considerations around sourcing shared services. The goal in each working group will be to roll up our sleeves and produce a template or other artifact to help advance common approaches to shared services, e.g., cost model template, standard SLA template, legal contract template. Each group will

focus around a specific service as it develops the generalized template. (Feel free to have a buddy IM-able on your campus if you need a lifeline.) {Participants choose from}

- i. Financial – Cost modeling for services (focus on data centers) – Deliverable: cost model template, 3-5 university's costs filled in — Jerry Grochow (MIT)
- ii. Outsourcing– "Collective bargaining" for services (focus on mobile contracts/ devices) – Deliverable: plan for approaching vendor(s) including letter(s) conveying our collective expectations—Bill Clebsch and Richard Katz (Educause)
- iii. Technical – Architecture and security implications (focus on shared identity management) – Deliverable: template listing technical and security factors/considerations – Michael Gettes (MIT) and Bruce Vincent (Stanford)
- iv. Legal – Common agreements for sourcing (focus on emergency/continuity services) – Deliverable: contract template for service; SLA or common service agreement – Brad Wheeler
- v. Governance – Oversight and “management” of shared service effort – Deliverable: Whitepaper evaluating options (one-off agreements versus offered by common entity, etc) and pros/cons – Ron Kraemer and Chuck Powell

12:00 – 1:30

Lunch

1:30 – 3:00

Outcomes and report out [15-20 minute reports from each working group] — Tracy

3:00 – 3:30

Break

3:30 – 4:30

Putting it Together and Next Steps — Deciding what next... Ann and Tracy

4:30

Workshop Ends

4:30 – 5:00

Special report from Greg Jackson on HEOA Negotiated Rulemaking process & outcome