The Canadian University Council of CIOs (CUCCIO)

The First Decade
2006-16

Celebrating 10 Years of Collaboration
Célébrons 10 ans de Collaboration

Contents

Chapter 1

Genesis

The formation of a national organization for higher education IT was an evolutionary process with strong antecedents. And it didn't happen overnight.

As the twentieth century came to a close, IT was becoming ever more important to the success of Canada's universities. Investment in all aspects was increasing: student computer labs were commonplace, faculty had begun to embrace the potential of online resources in their teaching, and administrative units were looking to new ERP systems to support increasingly complex business processes. Issues and available solutions were more varied every year, the pressures on both IT staff and IT leadership seemed to be unrelenting and the responsibilities of the Chief Information Officer (CIO[1]) role were expanding.

CIOs new and old were looking to network with peers to discuss issues they had in common and to share their experiences. Several US-based communities of interest such as Educause (formed when CAUSE merged with Educom in 1998) and vendor-sponsored user groups offered some opportunities, but they tended to be dominated by US interests. In Canada there were several regional groups. Atlantic Canada CIOs had been meeting as a group since 1986 and there were active groups in BC, Alberta and Quebec as well. But the largest and most mature of these was Ontario's Association of Computing Services Directors (ACSD). ACSD met three times a year and ran an annual conference, the Ontario Universities Computing Conference (OUCC), the location of which rotated among member universities.

John Sherwood from Dalhousie and Gerry Miller from Manitoba were both CIOs in those early days and note that the NetNorth[2] consortium, a non-profit user group of Canadian academic institutions and supporting organizations, had been bringing people together on networking issues for years. To quote from a 1990 publication[3],

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[1] Even in the 2000's our senior IT leaders carried a variety of titles. In fact a highlight of early CUCCIO meetings was a recitation of the titles held by those present. For simplicity the term CIO is used henceforth to refer to the senior IT leader, regardless of what the actual title might be at any given institution.

[2] The NetNorth network evolved into CA*net, eventually operated by CANARIE.

[3] Supplied by Roger Watt and available at https://personal.uwaterloo.ca/rwwatt/nnpp.html

The NetNorth Network is an electronic interconnection of organization-internal networks that are administered and operated by the Members. The NetNorth Consortium grew out of the desires of several Canadian universities' central-service computing and communications organizations to … create and operate a production-level network.

There was an annual conference, Netxx, that started in 1987 with Net87 in Guelph and ended in 2002 with Net02 in Fredericton. Roger Watt, then at Waterloo and an active participant in these meetings, recalls that he, John Demco from UBC and six others formed the ".ca Domain Administration Committee" at the Net88 conference.

As the millennium turned, the range of interests in higher education IT had widened beyond networking, and the desire for CIOs to connect with peers more broadly was becoming even stronger. Ted Dodds, the UBC CIO who had begun his career in Ontario before moving west, didn't want to lose his connection to his Ontario colleagues and so he continued to attend ACSD meetings. It was clear that the issues of interest to ACSD members were not specific to Ontario and that all could benefit from broader conversations. ACSD members began to see the advantages of national interactions. A nation-wide electronic distribution list, CANITDIRS-L, hosted by Eugene Siciunas on a list serve at the University of Toronto, was launched in March 2002 and discussions began about hosting a "Canadian Universities Computing Conference." In fact, the agenda for ACSD's 2002 fall retreat had an item "The National IT Conference and OUCC 2003" presented by Brock University's CIO, Jim Lennard. After some discussion, the decision was taken to rebrand the 2003 OUCC conference, which Brock was scheduled to host, as CANHEIT (Canadian Higher Education IT).

The first CANHEIT conference in June 2003 was a great success and gave even more momentum to the development of a national organization in addition to the national conference. CANHEIT gave opportunities for CIOs to network with each other at the CIO dinner, a popular annual event at CANHEIT conferences. There's much more on CANHEIT and its evolution in Chapter 7.

Sean Reynolds, then at Queen's, was among many who were seeing the limitations of the regional model. Issues were emerging that needed national engagement and CIOs believed they would have more leverage and greater influence working from a strong national body

rather than a loose collection of regional bodies. In addition to Ted Dodds, other CIOs from outside Ontario came to the ACSD fall retreats in 2003 and 2004 to discuss how this might be accomplished. Finally, at the ACSD 2005 fall retreat at Talisman Resort (in Ontario's Collingwood region) it was agreed to take a proposal to the CIO dinner at CANHEIT 2006 in Halifax, hosted by Dalhousie University. As ACSD Chair, Sean was tagged to give the pitch.

Attendees at ACSD's November 2004 Retreat
(including several from outside Ontario)

Top row: Ron Elmslie (Guelph), Bill Ross (Nipissing), Debbie Jones (Western),
Raj Govindarajan (Wilfrid Laurier), Jim Cranston (Simon Fraser), Luana Jursza (York)
Fourth row: Peter Dielissen (St. Thomas), Roger Watt (Waterloo)
Third row: Ted Dodds (UBC), Sean Reynolds (Queen's), Gary Bernstein (McGill),
John Levay (Brock), Kent Maharaj (Bishops)
Second row: Wilf Bussey (Memorial), Bob Gagne (York), Heather Grigg McMaster),
Eugene Siciunas (Toronto)
Bottom row: Art Exner (Regina), Ralph Michaelis (Carleton), Roger Lauzon (Windsor),
Susan Spence (York), Bill Sandblom (Laurentian)

Sean presented his proposal to the CIO dinner on Saturday evening, June 10, 2006, with the able assistance of Jim Cranston from SFU. Jim had also been at the Talisman meeting as one of the non-Ontario CIOs. The time was right, their proposal was compelling and it was received enthusiastically. Sean and Jim invited those interested in being involved in setting up the new organization to meet at lunch the next day around a picnic table outside Shirreff Hall.

The turnout for that historic lunchtime "picnic table meeting" was strong. Representatives from 35 institutions expressed their support for forming the new organization, an interim board was formed from 19 volunteers representing universities from all parts of the country, and 3 interim officers were named: Jim Cranston from Simon Fraser University as President, Rick Bunt from the University of Saskatchewan as Vice-President and Gerry Miller from the University of Manitoba as Secretary. The wheels were turning but there was still a long road ahead.

Shirreff Hall, Dalhousie University: Where It All Began

The Name Game

Rick Bunt came up with the name CUCCIO at the Dalhousie conference and he describes how this happened.

> The name came to me one afternoon at the Halifax meeting while I was walking along Spring Garden Road towards downtown. I was experimenting in my head with various combinations of the requisite terms and letters trying to come up with an acronym that was pronounceable (at least in English). Just before I reached Barrington Street I arrived at CUCCIO (**C**anadian **U**niversity **C**ouncil of **CIO**s). I liked it even though that Phil Collins song played in my brain the rest of the way to downtown. Unfortunately I neglected to run a check on the name before presenting it for adoption. Only later did we find it to be the name of a line of beauty products (?), thus preventing us from using the cuccio.ca domain name. Neither did the Canadian University Council of CIOs translate well into French. CDPIUC (Conseil des dirigeants principaux de l'information des universities canadiennes) hardly rolls off the tongue. Over time our francophone colleagues recommended that we abandon the French version so that CUCCIO became a name, not just an acronym.

The First CUCCIO Logo
(developed by staff from the University of Saskatchewan based on the
"digital maple leaf" designed at McGill for CANHEIT 2005)

Some Memories From Those Preliminary Meetings

Lori MacMullen recalls that CUCCIO was "built on collaboration born out of regional groups."

CFI awards being made to faculty on our campuses for high-end computing facilities were a prime motivator for increasing the collective involvement of CIOs at the national level. CIOs often ended up needing to integrate CFI-funded equipment into their institutional infrastructure without any advance warning. This reactive mode was putting central IT staff in difficult situations. A number of CIOs wanted to get in front of such decisions and felt that a single national voice with bodies such as CFI would be more persuasive than a host of individual voices.

Sean Reynolds recalls being "very nervous" as he presented the merits of a national organization to those assembled in Halifax in 2006. His worries about "too much Ontario" were clearly misplaced as evidenced by the enthusiastic reception. Jim Cranston was very pleased with "the way everybody stepped up and embraced the idea."

Roger Lauzon recalls an event from one of the early fall meetings at The Briars. After a very pleasant dinner the group went downstairs to play pool only to find that another group he describes as "bikers" were at the pool table. Roger recalls that someone, possibly Lori MacMullen, approached them and proposed a challenge match for the table ("brains versus brawn"). Roger teamed up with Alan George, the two of them were victorious and "the brains" won control of the table for the evening.

Some attendees had difficulties getting to Talisman Resort for the fall 2005 ACSD retreat. Rick Bunt's luggage didn't make it from Saskatoon.

> Despite Luana Jursza's kind offer to lend me some clothes I had to go up the road to the Meaford BiWay to buy some things to tide me over.

But Rick's story pales next to Gary Bernstein's. Several of those attending remember Gary arriving by cab. Here is Gary's account of what happened to him:

> I was visiting a friend in Toronto the weekend before the meeting and had arranged to pick up a rental car in Hamilton. When I arrived at Tilden I discovered that I had left my driver's license in Montreal. No amount of pleading could get the agent to rent me the car, but he was nice enough to call around to find a taxi driver who would drive me to The Briars on a Sunday. They quoted me $100 and I accepted. I figured my boss would accept the chit since it was less than the car rental price.
> So, about fifteen minutes later a very pregnant lady taxi driver shows up. We set off on our journey but after about 30 minutes I thought something was fishy because we passed the 401 twice! This was before the days of Google Maps. I asked her if she knew where she was going and she admitted that we were lost. Furthermore, expectant ladies have to frequently visit the loo, so we made a few pit stops along the way, which also turned out to be coffee and donut stops. I seem to recall that it took us about two hours to make the trip and the meter showed $250 or so. We compromised and settled on $175.
> As I got out of the cab at the front of the hotel someone pulls up right behind us. I can't remember exactly who it was, maybe Kent Percival, Jim Cranston or Mike Ridley. In any case, when he saw me his mouth dropped and he said something like "Was that you in the taxi I followed all the way from Hamilton?!
> Well, I couldn't live that down for the rest of the meeting. Remarks like 'can I call you cab, Gary' were rife. I think it was Heather Griggs who gave me a lift back to Pearson.

My boss was very understanding and approved the expense but the kidding didn't stop for weeks. I think that I hold the record for the most expensive cab ride ever taken by a McGill staff.

Eugene Siciunas, Gary Bernstein, Mike Langedock

Chapter 2

Bootstrapping the New Organization

An Event Waiting to Happen

The response to the proposal presented at CANHEIT 2006 was enthusiastic. Thirty-five institutions expressed their support immediately and an interim board was formed from nineteen volunteers representing universities from all parts of the country.

The First 35			
Acadia	Lethbridge	Regina	U de Moncton
Alberta	Manitoba	Ryerson	UPEI
Brandon	McGill	Saint Mary's	Waterloo
Calgary	McMaster	Saskatchewan	Western
Saint-Boniface	Memorial	Simon Fraser	Wilfrid Laurier
Dalhousie	Mount St. Vincent	St. Thomas	Windsor
École Polytechnique	Mt. Allison	Toronto	Winnipeg
Guelph	Nipissing	UBC	York
HEC Montréal	Queen's	UNB	

The Interim Board		
Calvin Barnes, Lethbridge	Debbie Jones, Western	Sean Reynolds, Queen's
Gary Bernstein, McGill	Luana Jurza, York	Mike Ridley, Guelph
Rick Bunt, Saskatchewan	Mike Langedock, Winnipeg	John Sherwood, Dalhousie
Jim Cranston, SFU	Roger Lauzon, Windsor	Paul Sorenson, Alberta
Ted Dodds, UBC	André Lee, Moncton	Mario Therrien, Glendon College
Harold Esche, Calgary	Lori MacMullen, UNB	
Bob Gagne, York	Gerry Miller, Manitoba	

Three interim officers were named:

- Jim Cranston from Simon Fraser as President,
- Rick Bunt from Saskatchewan as Vice-President, and
- Gerry Miller from Manitoba as Secretary.

Mario Therrien from Glendon College at York University served as Treasurer initially but, because Glendon College was not eligible for membership on its own, Bob Gagne, York's CIO, took over as Treasurer before the first meeting. Gerry Miller took on the task of preparing bylaws and dealing with our incorporation as a non-profit society, Rick Bunt took

on the task of coordinating initial communications and Jim Cranston provided strong leadership from the top.

Some key decisions were made that stand to this day. Eligibility for CUCCIO membership would be limited to institutions that are members of the Association of Universities and Colleges of Canada (AUCC[4]). A tiered membership fee structure was established (initially $1000 for institutions with fewer than 5000 students, $2500 for institutions with between 5000 and 7500 students, and $5000 for larger institutions). It was also agreed that there would be three CUCCIO meetings per year:

- A winter meeting in the February/March timeframe
- A spring meeting in conjunction with the CANHEIT conference
- A fall meeting, initially to be held in conjunction with the ACSD meeting

Meetings would move across the regions of the country on a rotational basis[5] so that travel distances would average out over the year. Each member institution would be entitled to send two delegates to meetings but would have only one vote.

Following the June meeting at CANHEIT 2006 the interim board met by teleconference on a monthly basis (July 10, August 18, September 22 and October 20) to iron out some of the initial issues and make plans for the inaugural CUCCIO meeting. Gerry Miller presented draft bylaws for review. Recognizing that the work needed couldn't be done off the side of someone's desk, competing for attention with the pressures of regular jobs, a working group consisting of Jim Cranston, Sean Reynolds, Bob Gagne, Debbie Jones and Lori MacMullen took on the development and circulation of a Request for Proposal for an association management firm to provide professional administrative support[6] with the able assistance of the purchasing director from the University of Western Ontario. Ultimately Greg McPherson, President of McPherson Management Ltd., became CUCCIO's first "staff member" in February 2007. Greg has been working under contract with CUCCIO ever since.

The stage was now set for CUCCIO's first formal meeting.

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[4] AUCC renamed itself "Universities Canada" in April 2015.

[5] Because of the density of population and institutions it was agreed that every other meeting would be in central Canada. Thus meetings moved from the west (BC, Alberta, Saskatchewan, Manitoba), to the centre (Ontario, Quebec), to the east (Atlantic provinces), back to the centre, and so on.

[6] Many now regard the early decision to hire professional management as a key success factor.

Attendees at the First CUCCIO Meeting: November 2006

The First CUCCIO Meeting: The Briars, November 12-14, 2006

The first formal CUCCIO meeting was a November retreat at The Briars in Jackson's Point, Ontario (on the shores of Lake Simcoe). To quote from the invitation, "This retreat setting will provide the ideal location for launching this new association and for in-depth discussions of shared issues, opportunities and concerns" and the schedule was structured to accommodate "a meeting of the Founding Board of Directors, business meetings for all CUCCIO members, and separate meetings for regional groups that would like to gather during the retreat."

Forty-five participants representing thirty-six Canadian universities gathered for that first meeting. The notes from the meeting show that significant progress was made on a number of fronts: the organization and structure were formalized, goals and objectives were discussed, some specific initiatives were proposed, some fundamental principles were confirmed and the first board and officers were formally elected.

The following mission was accepted for the new organization:

- To provide a national voice for Canadian university IT leadership
- To foster the professional development of the IT community within universities
- To facilitate information exchange among the members
- To provide a focal point for liaison with national and international organizations and interest groups concerned with IT
- To provide a vehicle for IT collaboration, cooperation and collective action

- To advocate national IT positions to national university governance groups, government and the vendor community

Several specific objectives were identified, including:

- Providing a forum for sharing ideas, best practices, technologies, etc.
- Facilitating joint project initiatives among interested universities
- Taking responsibility for the annual CANHEIT conference

Potential initiatives were defined in six areas of interest:

1. Establishing a secure, online repository of RFPs, policies, best practices, etc. for use by members. Leader: Gerry Miller (Manitoba)
2. Establishing special interest groups in some key areas along with mechanisms to support their work. The areas identified were: disaster recovery and business continuity, security, wireless, learning management systems, portal. Leader: Sean Reynolds (Queen's)
3. Pursuing a national strategy for Federated Identity Management to enable service/resource/application sharing (e.g. wireless roaming). Leaders: Gary Bernstein (McGill) and Kent Percival (Guelph)
4. Developing a mechanism to gather a common set of data for measurement and benchmarking amongst Canadian Institutions. Leaders: Mike Ridley (Guelph) and Bob Gagne (York)
5. Implementing a set of web-based tools to support communication and collaboration among members (e.g. wikis, survey tools). Leader: Jeff Sutton (Laurentian)
6. Developing an external relations plan. Leader: Lori MacMullen (UNB)

Fourteen institutions supported the collective pursuit of a project in federated identity management proposed by a working group consisting of Queen's, McGill, Toronto, UBC, Guelph and Windsor (per initiative #3 above). The participating institutions agreed to cost-share the preparation of a formal project charter and project plan with the intent that a technical demonstration of shared services enabled by Shibboleth be presented at CANHEIT 2007 in Waterloo, followed by an evaluation phase. This was the beginning of the Canadian Access Federation (CAF). The CAF project is described in more detail in Chapter 4.

The first formal Board of Directors was elected with seventeen members, including four officers. A conscious effort was made to elect a board with representation from universities both large and small from all parts of the country.

Funding and fees were early concerns. Jim Cranston was very happy to see the acceptance of the need for professional administrative support and Mike Ridley was struck by the rapid transition from "how cheaply can we do this" to "we need to get the funds to do what we

need to do." Despite the clear enthusiasm to put together a viable organization, the ability to pay what was required was a challenge, especially for smaller schools. To get over an initial hump several universities volunteered to pay extra initially, to ensure that the fledgling organization had what it needed.

The Founding Member Universities

Athabasca University	Ontario College of Art & Design	University of Guelph	University of Saskatchewan
Brock University	Queen's University	University of Lethbridge	University of Toronto
Carleton University	Royal Roads University	University of Manitoba	University of Victoria
Collège universitaire de Saint-Boniface	Ryerson University	Université de Moncton	University of Waterloo
Dalhousie University	Simon Fraser University	University of New Brunswick	University of Western Ontario
Lakehead University	Thomson Rivers University	University of Ontario Institute of Technology	University of Windsor
McMaster University	University of Alberta	University of Ottawa	University of Winnipeg
McGill University	University of British Columbia	University of Prince Edward Island	Wilfrid Laurier University
Nipissing University	University of Calgary	University of Regina	York University

The Founding Board

Jim Cranston, President	Simon Fraser University	Harold Esche	University of Calgary
Rick Bunt, Vice-President	University of Saskatchewan	Mike Ridley	University of Guelph
Gerry Miller, Secretary	University of Manitoba	André Lee	Université de Moncton
Bob Gagne, Treasurer	York University	Lori MacMullen	University of New Brunswick
John Sherwood	Dalhousie University	Alan George	University of Waterloo
Gary Bernstein	McGill University	Debbie Jones	University of Western Ontario
Sean Reynolds	Queen's University	Roger Lauzon	University of Windsor
Paul Sorenson	University of Alberta	Mike Langedock	University of Winnipeg
Ted Dodds	University of British Columbia		

Some Reflections from the Early Meetings

Gerry Miller was adamant that CIOs needed their own organization rather than seeking to affiliate with an existing body such as CAUBO (Canadian Association of University Business Officers). He characterizes the formation of CUCCIO as "an event waiting to happen" – a view shared by many in the founding group.

Founding Board Members at the Briars (2006)
Gerry Miller, Jim Cranston, Rick Bunt, Mike Ridley, Debbie Jones, Paul Sorenson, Gary Bernstein, Ted Dodds,
Lori MacMullen, John Sherwood, Roger Lauzon, Sean Reynolds, Alan George, Mike Langedock

Bob Gagne pays tribute to those involved in past organizations. In his view,

> CUCCIO is the realization of decades of provincial and national collaboration among IT leaders in Canada. I don't know that new entrants into our group could fully appreciate the contributions of our past colleagues working together.

Graham Mowbray came to CUCCIO meetings after his appointment as MUN's CIO in the fall of 2006 following experience as Executive Director of ACEnet. In Graham's words,

> I think my early intention was to understand better the gap between the Research Computing (i.e. HPC Consortia as they were at the time) and the Enterprise side of the business – I always felt that there could be/should be closer links between these. What I found was that the CIO group had a broader perspective and probably a more mature (IT-wise) perspective than I had imagined. This served me well as I think I managed to develop a set of priorities for my new job that would have been a challenge to quickly develop otherwise.

Institutions both large and small were active participants from the outset. Speaking as a representative of small institutions, Alastair MacLeod from OCAD appreciates that small institutions were always welcomed. Speaking as a representative of large institutions, Ted Dodds always felt that "we were stronger together than any of us could be on our own."

The CAUDIT Influence

Representatives from the Council of Australian Directors of Information Technology (CAUDIT), Australia's national body, attended CANHEIT 2008 in Calgary. This was a very important introduction at an important time. Predating CUCCIO by several decades, CAUDIT provided a very useful model for the Canadian organization and a valuable source of both encouragement and advice as the founding forces began to develop CUCCIO. Richard Northam, CAUDIT's Executive Director at the time, was especially helpful as CUCCIO was finding its feet. CUCCIO maintains a strong relationship with CAUDIT to this day, both directly and through the Coalition of Higher Education Information Technology Associations (CHEITA), the international association of associations.

Chapter 3

The Organization Matures

CUCCIO's early years were characterized by very productive meetings during which members developed strategic plans for the organization, worked to increase the organization's presence on the national stage, and began to pursue some important collaborative technical initiatives.

At the spring 2008 meeting in Calgary a subgroup of board members (including Rick Bunt, Jim Cranston, Bob Gagne, Lori MacMullen, Sean Reynolds and Mike Ridley) developed CUCCIO's first two-year business plan. It was refined over the summer and Bob Gagne (then Vice-President) presented it to the membership at the fall 2008 meeting in Fredericton. The plan spelled out a mission, a vision and four strategic goals.

CUCCIO's First Business Plan 2008-10

A) Mission

CUCCIO-CDPIUC supports collaborative initiatives with member universities, such as implementing a pan-Canadian access management federation to support access to protected resources and services, developing a mechanism for Canadian universities to gather a common set of data for measuring and benchmarking, and establishing a secure, online storehouse of requests for proposals, policies and best practices. We also oversee CANHEIT, Canada's annual national conference on IT in higher education, which takes place each year in the spring.

Through CANHEIT and other forums members keep abreast of new technologies and best practices, share information, accomplishments and ideas, and work with colleagues across the country in collaborative projects

B) Vision

The vision of CUCCIO-CDPIUC is to enhance the effectiveness and impact of information and communications technologies in higher education by fostering collaboration amongst institutions and positioning itself as a trusted advisor and partner to interest groups across the sector.

C) Strategic Goals

CUCCIO's primary goal is to deliver value to its member institutions through:
1. The development and delivery of collaborative, sector-wide services.
2. The development of relationships with governments, government agencies, corporations and other groups of interest to higher education in order to advance the shared interests of Canadian Universities.
3. Fostering best practices in information, communications and technology management amongst Canadian Universities.
4. The development and delivery of services to support the professional development of IT staff.

Following the acceptance of the business plan by the membership work began on a number of operational items, the first of which was the hiring of a full-time Executive Director.

> **Hiring an Executive Director[7]**
>
> While a great deal of energy and operational capacity for CUCCIO is expected to come from within its members, the appointment of an individual on a dedicated, full-time basis is critical to ensuring that there is the attention, accountability, skill and continuity necessary for ongoing service delivery to succeed.

The process for recruiting an Executive Director was put in place immediately after the Fredericton meeting. A search committee comprising Rick Bunt (President), Bob Gagne (Vice-President), Jim Cranston (Past President), Gerry Miller (Secretary) and Sean Reynolds (Board member) wrote a job description, fielded prospective candidates and developed a short list for interviews. Face-to-face interviews were arranged in Montreal after which Lori MacMullen, then CIO at UNB, was offered the position. Lori came with extensive CUCCIO experience. She had represented Atlantic Canada at the early ACSD meetings, had served on CUCCIO's Board since its formation and was in charge of external relations from 2006 to 2008. She accepted the offer on January 22, 2009, became CUCCIO's second employee on March 1, 2009, and has performed admirably in the ED role ever since.

The Board

From the outset CUCCIO enjoyed the services of enthusiastic and committed board members and a distinguished cast of officers, all of whom have worked diligently to advance the organization's agenda.

The Officers of CUCCIO

	President	Vice-President	Secretary	Treasurer
2006	Jim Cranston, SFU	Rick Bunt, Saskatchewan	Gerry Miller, Manitoba	Bob Gagne, York
2008	Rick Bunt, Saskatchewan	Bob Gagne, York	Gerry Miller, Manitoba	Donna Forbes, MSV
2010	Bob Gagne, York	Sean Reynolds, Queen's	Ghilaine Roquet, Montréal	Mark Roman, Victoria
2012	Ghilaine Roquet, Montréal	Jay Black, SFU	Art Exner, Regina	Terry Nikkel, UNB
2014[8]	Jay Black/Mark Roman	Mark Roman, Saskatchewan / Tariq Al-Idrissi, Trent	Michael Barr, Mount Royal	Bala Kathiresan, Windsor/ Francois Coallier, ETS
2016	Mark Roman, SFU	Tariq Al-Idrissi, Trent	Brian MacKay, Fraser Valley	Michael Barr, Mount Royal

[7] From The CUCCIO Operating Plan, October 2008.

[8] Mid-term resignations of Jay Black and Bala Kathiresan necessitated some position changes to the 2014 roster of officers.

Here's a sample of CUCCIO's boards in those early years.

2008 Board Members
Jim Cranston, Roger Lauzon, Bob Gagne, Debbie Jones, Harold Esche, Bob Cook, Sean Reynolds,
Ghilaine Roquet, Lori MacMullen, Rick Bunt, Donna Forbes, Alan George, Ted Dodds, Ralph Michaelis

2010 Board Members
Background: Mark Roman, Ted Dodds, Richard Labrie, Alan George, Graham Mowbray,
Terry Nikkel, Roger Lauzon, Ralph Michaelis, Rick Bunt
Foreground: Sean Reynolds, Bob Gagne, Lori MacMullen, Bob Cook

2012 Board Members
Back row: Terry Nikkel, Blair Vessey, Bob Gagne, Graham Mowbray, Richard Labrie
Middle row: Clark Ferguson, Lori MacMullen, Debbie Jones, Ghilaine Roquet
Front row: Bob Cook, Jay Black, Art Exner
On the laptop: Philip Wright

The Meetings

The regular CUCCIO member meetings have maintained the rotational pattern established at the outset and have brought members to some outstanding locations where they enjoyed the hospitality of gracious hosts. Regular attendees appreciate the opportunity afforded to see all parts of the country.

The meetings have consistently proven to be an excellent opportunity for lively exchanges and a sounding board for project ideas. All appreciate these sharing sessions, which Mike Ridley describes as "a conduit to new ideas" in a fashion Debbie Jones calls "trusted sharing." The discussions provide individual CIOs reassurance that the challenges they're facing aren't unique to them. In Terry Nikkel's words,

> I found lively discussions on many issues facing us all, leading to the clear understanding that no individual needs to face issues alone, as few are unique, and there is a willing community that shares freely and generously its experience and expertise.

Alan George recalls, "knowing what was going on elsewhere added to credibility and confidence at home."

Fall Meeting 2007 at Talisman Resort

Fall Meeting 2009 at Banff

CUCCIO's Regular Meetings

	Winter meeting	Spring meeting	Fall meeting
2006	N/A	Halifax	The Briars (Ontario)
2007	Vancouver	Waterloo	Talisman Resort (Ontario)
2008	Montréal	Calgary	Fredericton
2009	Victoria	Montréal	Banff
2010	London	St. John's	Toronto
2011	Edmonton	Hamilton	Halifax
2012	Vancouver	Saskatoon	Montréal
2013	Fredericton	Ottawa	Ottawa
2014	Windsor	Charlottetown	Winnipeg
2015	Vancouver	Fredericton	Montréal
2016	Toronto	Edmonton	Halifax

Occasionally a radical new idea is brought to the group for discussion and advice. A good example of this was the University of Alberta's email project. Jonathan Schaeffer recalls bringing his plan for replacing the university's in-house email system with cloud-based Gmail to the attention of his CUCCIO colleagues.

> I recall the Gmail discussions. Everyone in the room knew that cloud-based services had to happen but no one was willing to step forward. I stepped forward and was surprised by the reactions. Some people were strongly supportive – they were willing for someone naive (like me) to brave the political challenge. But then there were others (a minority) who were negative – there was no way they would trust university data to be housed externally, let alone in the United States. I persevered and achieved my goals. In the final stages of my two-year battle to get Gmail approved at the University of Alberta, I asked for and got written support from CUCCIO members. I greatly appreciated that! We needed to stand together.

Alberta's project generated a great deal of interest, and other members followed their journey closely as it unfolded. Jonathan's regular reports on the U of A experience shaped how other CIOs approached their plans for evolving their own email service. Armed with an understanding of the problems Alberta encountered and how they addressed them, others were able to avoid covering the same ground. They were also able to leverage some of the materials Alberta developed, such as privacy agreements.

Member meetings have provided other memorable experiences as well. Those attending the 2011 winter meeting had a special opportunity to experience a true Canadian winter in Edmonton. All acknowledged that the walk across campus to the meeting site was especially "bracing" with the temperature in the high minus 30s.

Special Interest Groups

Special Interest Groups (SIGs) were an important part of the vision from early on, providing a way for staff members to interact closely with peers at other institutions on their particular work interests. One of the earliest groups, and one that remains active and influential to this day, is the Security SIG. Debbie Jones from Western was the Board Sponsor of the group and she says,

> Security was an obvious choice for one of the first SIGs. It had been a regular topic of discussion at ACSD for years and was often featured in presentations at OUCC and then CANHEIT where individuals in this field had the opportunity to network and share. By 2006, at the inaugural meeting of CUCCIO, there was already a small informal group of security professionals to draw on to get the SIG going. CUCCIO offered the formal structure, guidance and connections necessary to evolve and support this group and develop it into something that could benefit all Canadian Universities. Chief Information Security Officers from Western and Queen's were picked to co-chair the group and by March 2007 a draft Terms of Reference was submitted to the Board for approval. Within months most of the CUCCIO member universities had a member in the SIG.

Terms of Reference	
Title:	Canadian Universities IT/IS Security Managers Group
Type:	Shared Interest
Mandate:	The purpose of this group is to create a trusted environment of collaboration for those with responsibilities in the area of IT/IS security management at Canadian Universities.
Specific Objectives:	• To share information, experiences, knowledge and activities with others with responsibility for IS/IT security. • To provide a secure forum to enable members to seek advice from others. • To identify and disclose best practices for information security at Canadian universities. • To seek opportunities for collaboration in information security initiatives in areas of commonality across universities. Examples of information security which are relevant to this group include: awareness and training, security incidents management and reporting, security assessment programs, copyright infringements, business continuity planning and disaster planning, legislation and compliance, Policy development, and governance, etc.

The Security SIG has been highly effective in coordinating national efforts to ensure the safety of the entire higher education space. The strong work of the Security SIG was formally recognized in 2015 when Jeff Gardiner, the SIG's co-chair (and Chief Information Security Officer at Western) became the first recipient of the CUCCIO Community Award. A number of other SIGs followed, each aimed at sharing information and best practices among the staff members responsible for the identified area or function at their respective institutions.

The following SIGs are currently active:

- Teaching Technologies
- Project and Portfolio Management
- Client Services
- PCI Compliance

Stabilizing the Finances

CUCCIO's fee structure had been a source of consternation from the earliest days. The goal from the outset was to have all AUCC universities, coast to coast, as members so that CUCCIO could confidently claim to represent the higher education IT community, but it had to secure the funding necessary to operate effectively while ensuring that membership fees did not present a barrier to membership, especially for the smaller institutions.

Several different models had been employed to balance this tension, with mixed success. In 2011 then-Treasurer Mark Roman was tasked with developing a brand new model based on the following principles:

- The model will result in enough revenue to allow for a balanced budget (providing sufficient revenue to cover anticipated expenses).
- The model will be seen as fair to members.
- Fees will be based on student enrolment numbers reported to AUCC (for full transparency), with a minimum and maximum cap on fees charged.
- Fees will be recalculated each year based on student enrolment numbers reported to AUCC.

After exploring a number of different approaches Mark came up with a new model that met the requirements and was seen by all to provide a fair and equitable fee structure. It was accepted by the membership at the spring 2011 meeting and serves to this day.

Chapter 4

Eduroam and the Canadian Access Federation

A national federated access management service had been advocated as a collaborative initiative for CUCCIO members from the first meeting. Led most notably by Kent Percival from Guelph, Gary Bernstein from McGill and Jens Haeusser from UBC, the initiative attracted the interest of an enthusiastic group of over a dozen "early adopter" institutions that had stepped up with commitments of both money and staff time at the outset so that the work could proceed in an effective fashion. Pilot projects had begun based on Shibboleth technology, the most prominent of which was an *eduroam* service. Interest in eduroam[9] had been strong from the early days and, through the efforts of our volunteers, it was ready for deployment in Canada by the spring of 2008 (in time for CANHEIT 2008 in Calgary). In addition to the technical work, CUCCIO also had to establish the Canadian Access Federation (CAF) with various formal agreements required to align with international practice.

With the acceptance of the 2008 business plan members endorsed the official roll-out of the service including a pricing structure, the formalizing of relationships and legal agreements with the first group of adopters, and the formalizing of relationships with technical service providers (at the time, Simon Fraser University and the University of Toronto) and international partners. Once it was officially launched, interest in implementing eduroam service spread across the country, with CUCCIO providing assistance to universities wishing to join the growing community.

It soon became apparent, however, that CUCCIO lacked the capacity to operate a national service, despite the enthusiasm of member institutions to do so. In December of 2008 CANARIE was approached to take over CAF and its associated services (including eduroam). Discussions continued for more than a year but CANARIE ultimately took on the

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[9] Eduroam is a secure, world-wide roaming access service developed in the Netherlands for the international research and education community. As stated in the eduroam documentation, it was developed to allow "students, researchers and staff from participating institutions to obtain Internet connectivity … when visiting other participating institutions"

responsibility for the service and hired Chris Phillips from Queen's as Program Manager for Federated Access Services.

Six years later CAF in general and eduroam in particular are important elements in CANARIE's service catalogue.

CANARIE's CAF Announcement

> **May 17, 2010: A WORLD OF RESEARCH RESOURCES IS JUST A CLICK AWAY**
>
> *CANARIE partners with CUCCIO, the Canadian University Council of CIOs, to provide researchers with easy and secure access to an ever-increasing pool of web-based resources*
>
> Canada is joining a growing number of nations whose researchers will benefit from seamless access to resources such as research databases and electronic library holdings hosted at their institution, at those across the country and even at institutions around the world. This is made possible by the Canadian Access Federation, a service funded by CANARIE and delivered in partnership with CUCCIO.

Looking back, many identify the implementation of the national eduroam service, and the associated activities, as the most praiseworthy of CUCCIO's many accomplishments over its first decade[10]. Not only was a very valuable service introduced to the Canadian higher education community, but the success of the project stands as a dramatic illustration of the power of applying the CUCCIO community's collective expertise to a national challenge, demonstrating that CUCCIO's mission to "help Canadian universities excel through IT innovation" is more than words.

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[10] Gerry Miller refers to the eduroam project as "the jewel in CUCCIO's crown."

Chapter 5

Growing Influence

From the outset, it has been a major goal for CUCCIO to serve as a vehicle to provide a much-needed voice for IT issues in the Canadian higher education sector and increase the profile and influence of Canadian university CIOs nationally (and internationally). The most effective way to approach such a task is through face-to-face introductions.

Because she had handled external relations prior to her appointment as Executive Director, Lori MacMullen was well positioned to take the lead on this. Shortly after her appointment, Lori and then-President Rick Bunt visited Carole Workman, then Executive Director of CAUBO to discuss the possibility of CAUBO handling CUCCIO's payroll, as well as ways that CAUBO and CUCCIO might cooperate on matters of mutual interest. This initial meeting established a strong working relationship between the two organizations that stands to this day. CUCCIO and its members, for example, have provided content to the annual CAUBO conference on issues relating to IT governance, strategic planning and maximizing the returns on institutional investments in information systems[11]. Other organizations were courted as well. Leaders of both CANARIE and Compute Canada were invited to early member meetings to provide introductions and briefings, and CUCCIO reached out to the Library community through CARL (the Canadian Association of Research Libraries) and CRKN (the Canadian Research Knowledge Network). CUCCIO continues to maintain these very important relationships through mechanisms such as CANARIE's CIO Advisory Committee and participation on the Research Data Canada Steering Committee. Most recently the Association of Registrars of Universities and Colleges (ARUCC) reached out to CUCCIO to provide advice and support for their efforts to support student mobility through the adoption of international data standards.

David Barnard, the President of the University of Manitoba, has become a valuable conduit to Universities Canada[12] and Chad Gaffield, former President of the Social Sciences and

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[11] Most recently, CUCCIO has partnered with CAUBO on the development of materials for boards and senior leaders on the issue of IT security.

[12] CUCCIO participated in helping to develop and deliver Universities Canada's Digital Futures Forum in December 2015.

Humanities Research Council (SSHRC), was a useful voice within the federal granting agencies (SSHRC, NSERC, CIHR, CFI) until his retirement. The current SSHRC President, Ted Hewitt, a former Vice-President Research at Western, is also well versed on issues of importance to CUCCIO (specifically the issues relating to digital infrastructure for research, the topic of Chapter 6). In recent years CUCCIO has also been called upon to provide input to a number of national and federal initiatives, including providing input to proposed changes to federal legislation such as the Copyright Modernization Act and the new Anti-Spam legislation.

In addition to providing a national voice for higher education IT at the federal level, international linkages are also important. Ever since representatives from Australia's national body, CAUDIT, attended CANHEIT 2008 in Calgary, CUCCIO has maintained a strong connection to CAUDIT. CUCCIO members were regular participants in Educause events since before CUCCIO, so a formal relationship was a natural thing to pursue. Lori MacMullen sits on their advisory council, CUCCIO alumnus Ted Dodds served on the Educause board for a number of years, chairing it in 2010, and Bob Gagne was part of the group that redesigned the Core Data Survey.

Coalition of Higher Education IT Associations

Largely through Lori MacMullen's efforts and contacts, CUCCIO has extended its influence internationally as a founding member of an international coalition of associations that share a similar mandate. Other jurisdictions represented include Australia, the United States, South Africa, Japan, the United Kingdom, Spain, Italy, Germany and Hong Kong. This coalition provides additional opportunities for sharing of information and best practices, and opportunities for collaboration at the international level with recent work focusing on developing approaches to international benchmarking.

Chapter 6

Taking on the National Digital Infrastructure Challenge

Many CIOs, a number of whom were or had been active researchers, saw problems with the fragmented way Canada provides the digital infrastructure ecosystem required by university-based researchers. The massive amounts of data coming from experiments conducted on "big science" facilities, the expanding computational requirements in all research fields and the need to collaborate with colleagues around the world all present significant challenges for both researchers and university IT units. With national service providers such as CANARIE and Compute Canada competing rather than cooperating, CIOs saw an important role for CUCCIO in advocating a more coordinated approach.

Jonathan Schaeffer remembers the genesis of CUCCIO's involvement this way:

> I recall having drinks at a CUCCIO reception (not sure which one) where we bemoaned the lack of national leadership when it came to information technology infrastructure across the country. I know that Rick Bunt and Jay Black were part of the discussion. From that talk came the idea of a national summit and leadership council and, as they say, the rest is history.

Jonathan and Rick presented some of their early thoughts on the issue at CANHEIT 2011[13]. They saw a policy gap at the national level, fragmented approaches to planning and delivery, overlapping jurisdictions, inconsistent funding, and an excessive focus on equipment that overlooked the need for people to operate and manage it. Their conclusion: Canada needs

- a national vision for the digital infrastructure needed for contemporary research;
- a coordinated approach to providing it;
- a single locus of responsibility; and
- funding to sustain success.

To help achieve these objectives CANARIE and Compute Canada struck a joint task force, with Jonathan and Rick representing the boards of Compute Canada and CANARIE, respectively. The task force was tasked with looking for ways for the two organizations to work together in pursuit of a coordinated national approach. University Vice-Presidents Research were represented by Ted Hewitt from Western, who later became the President of the Social Sciences and Humanities Research Council (SSHRC). The task force met many

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[13] Rick Bunt and Jonathan Schaeffer, *The New National Dream: A Vision for Digital Infrastructure in Canada* (presentation given at CANHEIT 2011). June 2011.

times over a two-year period but produced little beyond a written report[14]. Certainly more needed to be done.

Seeing a growing urgency CUCCIO convened the first National Summit on Digital Infrastructure in Saskatoon in June 2012. To ensure the event had the necessary *gravitas* David Barnard, the President of the University of Manitoba (and a former CIO at Queen's), and Chad Gaffield, the President of the Social Sciences and Humanities Research Council, were asked to be the honorary co-chairs. Both agreed enthusiastically and provided guidance and advice throughout the planning for and delivery of Summit 2012.

Invitations were extended to representatives from the research community, university administrations, funding agencies, infrastructure providers and government, and more than seventy-five showed up for the day-and-a-half meeting[15]. Following David Barnard's inspiring "call to arms" opening and a number of position presentations from researchers, all agreed that the problems were real and that a new approach was required to address them in a coordinated way. A new body was proposed, the Leadership Council for Digital Infrastructure (LCDI), with representatives from all the major stakeholders, to coordinate efforts going forward. From its website,

> The Leadership Council for Digital Infrastructure is at the forefront of the national effort to build an advanced Digital Infrastructure (DI) ecosystem. By accelerating research, education and innovation in all sectors, and at all levels, an integrated, inclusive, comprehensive, accessible and sustainable advanced DI ecosystem will help ensure that Canada maintains its competitive advantage in the knowledge economy.

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[14] *Canadian Digital Infrastructure for Research, CANARIE/Compute Canada joint study.* October 2011.
[15] Weather problems in Calgary forced some to miss the first evening.

The inaugural co-chairs were Jay Black, CIO at Simon Fraser, and Steven Liss, Vice-Principal Research at Queen's.

The Council continued its work as a "coalition of the willing" throughout 2012 and 2013, convening a number of meetings and participating in other associated discussions and initiatives.   CUCCIO continued to play a strong role as both a member and the coordinating body for the work of the Council.   A second national summit was held in Ottawa in January 2014 at which a number of draft policy statements and supporting frameworks were presented for discussion and in some cases adoption. Summit 2014 resulted in the identification of a set of priorities for the "digital infrastructure ecosystem" and the establishment of at least two pilot projects to address issues relating specifically to pressing research data management issues.

CUCCIO participates on a Universities Canada panel on digital infrastructure
with representatives from Compute Canada and CANARIE
Mark Dietrich (Compute Canada), Janet Halliwell (consultant), Brent Herbert-Copley (SSHRC),
Christine Tausig-Ford (Universities Canada), Jim Ghadbane (CANARIE), Lori MacMullen (CUCCIO)

The Council continues to work hard to bring DI issues to the attention of key stakeholder groups such as Universities Canada, and, in February 2016, to Canada's new Minister of Science, the Honourable Kirsty Duncan. A follow-up letter to Minister Duncan from the current chair, Feridun Hamdullahpur (President of the University of Waterloo), summarizes an important conversation and signals the Council's continuing commitment.

Your challenge to us – to affirm our collective intention to work collaboratively to ensure that Canada has a strong digital research infrastructure ecosystem in place to support the critical research undertaken by Canada's academic research community – was well-received. Our discussions following your visit were very productive and we are pleased to confirm that we committed unanimously to work in partnership with one another through the Leadership Council for Digital Infrastructure (LCDI) to achieve this end. We also confirmed a common vision and mission, as well as a set of objectives and goals, which are attached to this letter. Finally, we reaffirmed our commitment to engage with Canada's academic research community, both individually and as the LCDI, in order to ensure that we are aware of and responding to their needs.

While there's been impressive progress to this point, much more remains to be done.
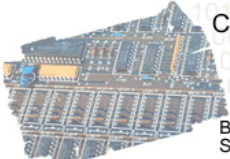
Chapter 7

CANHEIT

Although the CANHEIT conference predates CUCCIO by three years their histories are inextricably interconnected, and CUCCIO's role in CANHEIT has expanded over the years.

CANHEIT began as a rebranded Ontario Universities Computing Conference in June 2003 and was hosted by Brock University under the leadership of ITS Director Jim Lennard. The conference kicked off with a welcome from Brock's President, David Atkinson, and featured inspiring keynote presentations by Elliot Katz from Microsoft, Chuck Hamilton from IBM and Ted Dodds from UBC (who subsequently hosted CANHEIT 2004). A highlight of the excellent social program was a wine-tasting reception hosted by Brock's Oenology and Viticulture Program, followed by a trip to Niagara Falls for dinner at Table Rock Restaurant. A tradition had begun in a great way!

CANHEIT 2003

CANHEIT moved to the west coast in 2004, hosted by UBC, where the beautiful UBC campus and west coast hospitality complemented a strong technical program. Central Canada hosted again in 2005 at McGill and Atlantic Canada hosted for the first time in 2006 at Dalhousie.

The CANHEIT 2004 Website

A Sampling of CANHEIT Thumbnails
Top: 2003, 2004, 2005
Middle: 2006, 2007, 2008
Bottom: 2009, 2010, 2012

The CANHEIT Conferences: 2003-2016

	Location	Host University
CANHEIT 2003	St. Catharines, ON	Brock University
CANHEIT 2004	Vancouver, BC	University of British Columbia
CANHEIT 2005	Montréal, PQ	McGill University
CANHEIT 2006	Halifax, NS	Dalhousie University
CANHEIT 2007	Waterloo, ON	Wilfrid Laurier University and University of Waterloo (joint hosting)
CANHEIT 2008	Calgary, AB	University of Calgary
CANHEIT 2009	Montréal, PQ	Université de Montréal
CANHEIT 2010	St. John's, NL	Memorial University
CANHEIT 2011	Hamilton, ON	McMaster University
CANHEIT 2012	Saskatoon, SK	University of Saskatchewan
CANHEIT 2013	Ottawa, ON	University of Ottawa and Carleton University (joint hosting)
CANHEIT 2014	Charlottetown, PEI	University of Prince Edward Island
CANHEIT 2015	Fredericton, NB	University of New Brunswick
CANHEIT 2016	Edmonton, AB	University of Alberta

CANHEIT is now the premier national conference for higher education IT professionals in Canada. With themes ranging from "Your IT Info-Structure" in 2003, to "Riding the Waves of Change" in 2010, to "Building the Digital University" in 2012, to "Shaping the Digital

Landscape" in 2016, CANHEIT's content has reflected the topical issues, challenges and opportunities faced by Canadian higher education IT over the years. Staff, managers and CIOs from universities and colleges across the country come together every year to network, share their experiences, showcase best practices and simply enjoy one another's company. They value the opportunity CANHEIT offers them to spend time on other campuses, to socialize with their peers and to enjoy regional cuisine from coast to coast. Each host committee works hard to showcase their campus and their city, and to put on a memorable event for their visitors.

Graham Mowbray recalls how he came to host CANHEIT 2010 at MUN:

> When I first showed up as a member of CUCCIO [in 2006] I was informed that MUN was up for CANHEIT in 2010 as we had skipped 2006 because of Wilf Bussey's departure. That was a challenge at the time – but it turned into a big boon for those of us at MUN as the inter-departmental teamwork needed and the relationships developed carried forward long after CANHEIT was over.

As CANHEIT has grown over the years so too has CUCCIO's role in it. The conference is now a special event for IT professionals in Canada and firmly part of CUCCIO's yearly activities. Beginning with CANHEIT 2007 in Waterloo (co-hosted by Wilfrid Laurier University and the University of Waterloo) profits have been shared between CUCCIO and the local organizing committee. CUCCIO now provides seed funding and year-to-year continuity, with local committees adding their own personal touches. CUCCIO helps with sponsorship and also ensures that the fabled CANHEIT banner, which made its first appearance at CANHEIT 2005 at McGill, enjoys safe passage from one host committee to

MUN's CANHEIT 2010 Conference Team (with the CANHEIT banner)

The University of Alberta's CANHEIT 2016 Team

the next. Experiments have been undertaken in co-locating CANHEIT with other conferences, first with the annual CAUBO conference in 2010 and, in 2016, with HPCS (High Performance Computing Symposium).

Some Memories of CANHEIT

Mike Ridley comments on the very positive synergies between CANHEIT and CUCCIO.

> CANHEIT predated CUCCIO but 'taking over' CANHEIT was a critical decision for CUCCIO. CANHEIT provided a ready-made platform upon which to build CUCCIO. If we had to start CANHEIT from scratch it would have taken longer to secure the role and influence of CUCCIO. It was a natural alignment; and it works wonderfully for CUCCIO.

From Graham Mowbray,

> For me the evolution of CANHEIT into a very high quality conference is the most obvious accomplishment of CUCCIO. The peer groups and discussions at the members meetings are also quite valuable but typically that value is enjoyed by only a few from each member site. CANHEIT allows for more staff members to be involved and to gain from their peers.

A delegation from our sister society in Australia (CAUDIT) attended CANHEIT 2008 in Calgary, affording a wonderful opportunity for CUCCIO members to learn from their experience, to enjoy their Aussie spirit and to establish important connections.

Rick Mercer thoroughly entertained attendees at the CANHEIT 2013 banquet in Ottawa with his keen political insights and clips from his TV show over the years, and Jon Montgomery,

gold medalist in the men's skeleton event at the 2010 Winter Olympics in Vancouver and now a TV host, was a keynote speaker at CANHEIT 2016 in Edmonton.

CAUDIT's President Tackles Calgary's Olympic Bobsled Run

*Rick Mercer entertained
at CANHEIT 2013*

*Jon Montgomery was a keynote speaker
at CANHEIT 2016*

A CANHEIT Photo Gallery

Piping in the Lobsters at CANHEIT 2006

CANHEIT 2007

Art Deco Architecture at CANHEIT 2009
Pavillon Roger-Gaudry, Université de Montréal

CANHEIT 2011
Roger Lauzon, Lori MacMullen,
Greg McPherson

CANHEIT 2012
Rebecca Graham, France Couture,
Zenith Keeping, Anne Parker

A Swinging Time at CANHEIT 2016

Chapter 8

The CUCCIO Awards

From the outset, CUCCIO has sought to celebrate the innovative and collaborative work of the Canadian higher education IT community. In 2014 the board decided it was time to introduce an awards program to recognize and honour these accomplishments. Graham Mowbray and Rick Bunt, both recently retired, were approached to work with Lori MacMullen to come up with the elements of a program in time for the first awards to be made at CANHEIT 2015 in Fredericton. After some discussion they proposed that there be three awards framed around CUCCIO's three pillars: Communication, Innovation and Collaboration. Candidates for awards would be nominated by, and awards received by, CUCCIO members, and finalists would be pre-announced in each category with the winner announced at the CANHEIT Gala Dinner each year.

Rick provided an update on their discussions and recommendations at the 2014 fall members meeting in Winnipeg. From the notes from that meeting, "The CUCCIO Board has reviewed and approved the program subject to some considerations." Mark Roman was added to the Awards Committee as the board's representative for the first year, along with Graham and Rick, and Terms of Reference were written for three awards:

- **The Collaboration Award** recognizes initiatives that promote collaboration within the higher education IT sector – between users, faculties or departments, campuses or institutions -- through the development of new leading practices or new service models within institutions, between institutions or across the sector or the through the implementation of common or shared services leading to operational efficiencies or increased effectiveness.
- **The Innovation Award** recognizes innovative work that has led to significant technological advances in support of teaching, learning, research or administration, within the institution or in the community.
- **The CUCCIO Community Award** recognizes an individual, group or institution whose efforts exemplify CUCCIO's desire to build, support and enrich the higher

education IT community.   Unlike the innovation and collaboration awards, this award will honour a member institution or individual who has demonstrated a passion for CUCCIO's principles of information-sharing, collaboration and knowledge creation throughout the CUCCIO community.

Graham summarized the intent of the awards in the *CUCCIO Connector eNewsletter*.

CUCCIO has shown a lot of value in knowledge sharing and peer networking, and it's quite obvious that CUCCIO members learn, share experiences and take advice from one another. The awards are a way of highlighting excellence in what CUCCIO is doing.

The CUCCIO Awards: Queued for Presentation

A call for nominations for the inaugural awards went out early in 2015, the committee carefully reviewed the nominated projects and three finalists were selected for both the Innovation Award and the Collaboration Award, one of whom was selected as the recipient of the award. Over the course of the committee's deliberations it became apparent that the CUCCIO Community Award was a special award, which unlike the others would be difficult to judge. The CUCCIO Board was asked, and accepted, to be the owner of the Community Award and as such would identify potential recipients and the ultimate recipient.

With the emphasis being on celebrating the great work across the Canadian higher education IT community, the three finalists are not only feted at the gala but also provided an opportunity to present their projects during the CANHEIT conference. As a result, although only one takes home the glass maple leaf, all leave feeling they have been acknowledged by their peers.

The University of Saskatchewan was given the 2015 Innovation Award for their OwnCloud project, a private Dropbox-like service hosted at the university. From the award announcement,

> The OwnCloud service is integrated into the university's storage systems so data is accessible on all platforms (desktop and mobile).

The 2015 Collaboration Award went to the Education Computing Network (ECN) consortium of universities and colleges in New Brunswick and Prince Edward Island for their work in advancing shared services among its members. From the award announcement,

> ECN … recently partnered with the Canadian Access Federation to deploy federated identity, which allows users at member institutions to easily and freely login to resources and services at the other member institutions.

The 2015 CUCCIO Community Award was given to Western University's Jeff Gardiner, Chief Information Security Officer at Western and Co-Chair of the Security SIG. From the award announcement,

> The Security SIG is often provided as an example of an effective and successful approach to building a close community where collaboration is encouraged and sharing is the norm. Through Jeff's leadership and the dedication and commitment of the Security SIG the entire higher education space is a safer place to work and share data.

For the 2016 awards season Michael Barr from Mount Royal University replaced Mark Roman as the board's representative on the Awards Committee. Robert Brennan at the University of Alberta's Augustana Campus won the Innovation Award for his work with their DidUknow Technology Training Initiative. From the nomination,

> Often new technology tools are underutilized or go unnoticed. The DidUknow platform enables IT to regularly provide hands-on exposure to these tools, leading to increased utilization. Furthermore, these sessions help IT build rapport within the community because of the consistent face-to-face nature of the program. This increased rapport also helps shift our role as 'service provider' towards 'trusted advisor'.

The 2016 Collaboration Award went to staff at UBC for their work on a project called BC Contactless Transit Card Conversion, an undertaking between eleven student associations (including UBC's), ten public post-secondary institutions (including UBC) and the greater Vancouver transit system operated by TransLink. According to their nomination,

> The purpose of the initiative was to develop an on-line system by which eligible students would avail themselves of their U-Pass monthly transit pass benefit.

Prior to the introduction of the Compass Card, students would collect the (physical) monthly pass from dispensing machines located on campus. The introduction of Compass Card necessitated the transition to a virtual pass that is loaded onto the RFID-based card on a monthly basis. As one of the participating post-secondary institutions, UBC executed the business and technical changes as per the U-Pass BC Interface Requirements. More importantly, UBC represented all ten post-secondary institutions to TransLink for the purpose of negotiating and designing the Interface Requirements, including development of the initial prototypes and test environments.

The 2016 CUCCIO Community Award went to Bob Cook, retiring CIO at the University of Toronto, as a tribute to his many years of service to CUCCIO and its ideals. Bob was recognized for "his efforts to advance CUCCIO's vision to build, support and enrich the higher education IT community [and his] demonstrated principles of information-sharing, collaboration and knowledge creation throughout the CUCCIO community."

The 2015 CUCCIO Award Winners and Finalists
Back row: Jennifer Hadley (Saskatchewan), Dana Sanderson (UPEI), Rina Robichaud, (Moncton Shippagan)
Front row: Gary Wagner (Wilfrid Laurier), Andrew McAlorum (Waterloo), Glenn Hollinger (Saskatchewan),
Jeff Gardiner (Western), Fareed Teja (Toronto), Terry Nikkel (UNB), Jim Carse (Queen's),
Shaun Cahill (Queen's), Brian Stewart (Alberta), Nick Graham (Queen's),
Richard McDonald (Holland College)

*Robert Brennan (University of Alberta)
accepts the 2016 Innovation Award from
CUCCIO President, Mark Roman*

*Luca Filipozzi (UBC) accepts the
2016 Collaboration Award from
CUCCIO Board member, Brian Stewart*

In only two years the Awards Program has become an important part of CUCCIO's activities and a highlight of the CANHEIT conference. Many feel that the recognition the program affords the winning initiatives, both within CUCCIO and within the institutions, is long overdue.

We are pleased to share that Robert D. Cook, U of T's Chief Information Officer, was honoured with CUCCIO's Community Award at the CANHEIT / HPCS 2016 Conference on June 20th at the University of Alberta in Edmonton, AB.

The CUCCIO Awards are designed to honour individuals, groups or institutions whose work exemplifies CUCCIO's efforts to build and support Canada's higher education IT community. The awards include two other categories, the Innovation Award and the Collaboration Award.

Mr. Cook was awarded with the Community Award as a recognition for his efforts to advance CUCCIO's vision to build, support and enrich the higher education IT community. CUCCIO further acknowledged Mr. Cook's demonstrated principles of information-sharing, collaboration and knowledge creation throughout the CUCCIO community.

In his *video message* to the delegates at the conference, Mr. Cook expressed his gratitude to his peers and colleagues from across Canada, "I am deeply moved that you, my peers, have bestowed this honour for my commitment to the professional collaborative value of the CUCCIO community, a community that serves each of us and our institutions so consistently well."

The University of Toronto Acknowledges Bob Cook's 2016 CUCCIO Community Award

Chapter 9

The Value Proposition

Organizations are successful to the extent that they bring value to their stakeholders, both those within the organization and those external to it. CUCCIO stakeholders recognize and applaud the value that CUCCIO returns.

Those involved in its creation rate their participation in CUCCIO as a very positive experience, both professionally and personally. To cite a few examples, Jim Cranston is proud that CUCCIO was able to bring IT into the fold of influential national bodies such as CANARIE, Compute Canada, CAUBO, CRKN and the funding agencies. In his view, CUCCIO has successfully ensured that more attention is paid to CIOs. Alan George derived value from "rubbing elbows with colleagues across the country and getting to know them," adding that knowing what's going on at other institutions "added credibility and confidence at home." Bob Gagne expresses it in this way,

> Knowing virtually every University CIO in the country on a first name basis and knowing that they can all be approached for advice and counsel is very valuable. The knowledge gained through those relationships can and has translated into better decisions at York – I am sure of it.

Mark Roman characterizes the networking and the collaborations as visiting "trusted friends" and Graham Mowbray saw his CUCCIO colleagues as "like-minded people who I looked forward to spending time with at our meetings." Terry Nikkel feels that his institution (UNB) "benefitted from an informed CIO encouraging practices and processes consistent with similar organizations." Debbie Jones, who was there from the beginning, offers this perspective.

> I became part of ACSD in 2001 and we already had a couple of 'outside Ontario' members. When I look back, my first impression was being surprised at how different we all were. Different organizational structures, different reporting structures, different governance and policy structures, different funding models, and different levels of advancement in all the multitude of things we did. But the next thing I remember was how great it was to be able to talk to others that knew what you were talking about! It was the people that really made CUCCIO. You could find new ideas, ask questions, validate directions, provide connections and assistance to your staff, debate ideas (yes, occasionally we disagreed) and in general be a part of a supportive friendly group that helped you do your job even better. I have great memories of CUCCIO!

As CUCCIO's influence spread, its impact was felt outside the CIO community as well as within it. Paul Sorenson and Mike Ridley are among many who feel that CUCCIO's most significant accomplishment was becoming "a strong presence on the national scene," building a strong connection with organizations such as CANARIE, Compute Canada and CFI and having a voice in the important national conversations. David Barnard, the University of Manitoba's president, appreciates CUCCIO's role in the national conversation around digital infrastructure for research. Jim Roche, former CANARIE President, saw CUCCIO as an important link to the higher education community and Jonathan Schaeffer, now Dean of Science at the University of Alberta (formerly the Vice Provost and Associate Vice-President, Information Technology), praises CUCCIO's efforts in spearheading the implementation of eduroam service across Canada.

Since its inception, CUCCIO has been a tremendous partner to CANARIE, providing us with valuable guidance and insight in the development and delivery of our programs and services to universities. One example is our recent partnership with CUCCIO in operating the Canadian Access Federation. Now operated by CANARIE, this service was launched by CUCCIO to promote collaboration and provide Canadian university students, faculty and staff with seamless access to wireless campus networks and web-based resources when visiting other institutions.

JIM ROCHE
Former President and CEO
CANARIE

CUCCIO brought together many constituencies for a national digital infrastructure conversation, in support of Canada's researchers. This is a complex subject involving a number of stakeholders from across the country. CUCCIO is able to bring people and ideas together in collaborative, solutions-focused ways.

DR. DAVID BARNARD
President and Vice-Chancellor
University of Manitoba

Member Testimonials

CUCCIO provides excellent professional development opportunities by highlighting national and international trends, and by promoting collaboration among IT leaders and staff alike. The Special Interest Groups are a perfect example. Leading IT in higher education is unique and it's invaluable to have such a tight-knit community with whom to share.

Ghilaine Roquet
CIO
McGill University

CUCCIO should applaud itself for many accomplishments, but one that needs to be highlighted is the work on eduroam. I am constantly amazed at how often I use eduroam. In 2014 I was on the Oslo airport and delighted to discover that I could use eduroam for free WiFi access.

Jonathan Schaeffer
Dean of Science
University of Alberta

The sharing of ideas and experiences with colleagues dealing with similar issues across the country enables me to respond promptly and proactively to things that would take months to investigate in isolation. CUCCIO also facilitates invaluable learning and growth opportunities for our staff.

Kim Benoit
Executive Director, Technology Solutions Centre
University of Winnipeg

This is a group of trusted peers and advisors. When trying to sell your ideas to others within your institution, being able to say what your peers are doing is extremely helpful. If you can bring CUCCIO out as an example -- this is what I think, and this is what my peers are doing -- that's a big one.

Bo Wandschneider
CIO
Queen's University

I gain value from CUCCIO in three ways: cross-Canada communications and sharing. the benefits of a common voice for IT in higher education, and collaboration through initiatives like the Canadian Access Federation. CUCCIO provides a network I can depend on.

Blair Vessey
Director, IT Systems and Services
University of PEI

CUCCIO provides great value for the money, but beyond that, it's hard to place a value on the opportunities provided for learning from colleagues. It would be especially valuable to someone new to Canada and learning the Canadian terrain.

Rebecca Graham
CIO and Chief Librarian
University of Guelph

It's hard to put a dollar value on what CUCCIO brings, but the return on investment has been way beyond the overhead. Being able to interact with and gain insights from this community is huge. It's so beneficial to be able to ask questions and get thoughtful responses that really help move things forward.

Alastair MacLeod
CIO
OCAD University

CUCCIO consistently gives my university returns that far exceed expectations. U of T's membership has saved us hundreds of thousands of dollars thanks to the experience and advice of my peers.

Bob Cook
CIO
University of Toronto

Chapter 10

Closing Reflections

After a decade of accomplishments this is an appropriate time to reflect. It's fair to say that CUCCIO has been a great success. It has made excellent progress in achieving the goals set out by its founding members at those first meetings and it has brought value to its members, to their institutions and to the nation. It has provided opportunities for IT professionals to come together at meetings and conferences, and has encouraged them to work together on important national challenges such as IT security and federated identity management while advancing the cause of critical national initiatives like digital infrastructure for research.

CUCCIO filled a gap. Mike Ridley speculates on why it took so long when colleagues in other areas (Library, Registrar, Student Affairs, etc.) had already created national associations for their interests. He attributes the timing to a merging of several trend lines.

> I think the answer lies in the maturation of IT and the rise of the CIO role. CUCCIO arose, and was needed, because IT had changed, both internally (IT thought of itself differently) and externally (the University looked at IT differently). The shift from IT as merely computing to IT as organizational enabler had already started and it was reaching a broader institutional audience (i.e. presidents and provosts were seeing this). Would IT rise to the opportunity? CUCCIO became a means to do that.

There was some discussion in 2006 of linking to an existing organization that already had effective infrastructure rather than creating a new one. The leading candidates were CAUBO or Educause, both solid organizations with well-oiled structures and long histories. While some supported linking, others were strongly opposed. The prevailing view was that IT issues would never get sufficient attention within the broad scope of CAUBO and that Canadian interests would be lost within the massive entity that is Educause. As Mike Ridley puts it, "In the end the national needs, difference and a desire for independence won the day."

CUCCIO can take justifiable pride in the progress it has made over its first decade. It has successfully established itself as Canada's voice of higher education IT and has given university CIOs the *gravitas* they were seeking in 2006. CANHEIT has become a major annual conference, a "go to" event for IT staff and CIOs as well as for sponsors. While the Leadership Council for Digital Infrastructure is still finding its feet, there is no doubt that the cause of a coordinated national approach to providing the digital infrastructure university-

based researchers require is now well-understood. And, finally, CUCCIO now has a prominent place in the international community of higher education IT societies such as CHEITA, giving Canada its first presence at those tables.

As CUCCIO's first decade has ended, most of the individuals involved in its creation have retired or left, but new CIOs have stepped forward to replace them and the organization's strength is undiminished. CUCCIO's value to its members and the communities they serve is as strong at the end of its first decade as it was at the beginning. Mark Roman sees this continuity as a sign of success and evidence that "we got it exactly right." CUCCIO is most definitely an important player on the national scene and its commitment to the founders' mission remains as strong as it ever was.

Celebrating the People

Strategic plans, governance issues, cooperative initiatives, … in the end people remember the people. Here's a brief sampling of our colleagues over the years.

Donna Forbes enjoys a
Paul McCartney concert

Gerry Miller retires

Harold Esche,
CIO cover boy

Mike Ridley works
in the Library

Bob Gagne (Bob 1)

Bob Cook (Bob 2)

Ralph Michaelis

Debbie Jones

Sean Reynolds

Ghilaine Roquet
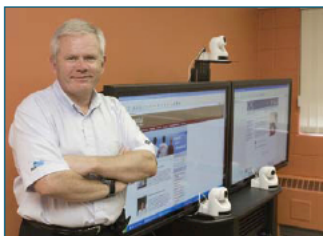
Alan George

Jay Black

Mark Roman

Art Exner

Jim Cranston

Ted Dodds

Graham Mowbray

John Sherwood

Terry Nikkel

Perry Sisk

Acknowledgements

As much as possible I wanted to cast this history in the words of those who made it. To that end I conducted a series of interviews with a number of the founding fathers (and mothers). I am indebted to the following individuals who gave generously of their time to talk with me, providing insights, information, memories and stories.

Gary Bernstein	Lori MacMullen
Jim Cranston	Gerry Miller
Ted Dodds	Sean Reynolds
Alan George	Mike Ridley
Debbie Jones	John Sherwood
Roger Lauzon	Paul Sorenson
Alistair MacLeod	

Others took the time to provide information by completing a questionnaire, by sending me their thoughts by email or simply by answering questions I posed. I thank the following for the help they provided in that form.

Bob Gagne	Jonathan Schaeffer
Graham Mowbray	Roger Watt
Terry Nikkel	Philip Wright
Mark Roman	

My thanks go out to Lori MacMullen, first for offering me the opportunity to take this project on and, later, for answering numerous questions, doing a careful review of the penultimate draft and providing excellent feedback. Debbie Jones, Gerry Miller and John Sherwood read through an earlier draft and corrected errors, filled gaps and provided other helpful comments.

Lea Pennock, my friend and former colleague here in Saskatoon, lent me her considerable skills as an editor, something I've relied on many times over the years.

Finally, I dedicate this history to all my CUCCIO colleagues over the years. We had many good times together. I know you're reading this and I want you to know how grateful I am for your wise counsel, your good humour and your unending support. I hope you enjoy this account of our history.

Assembling this history afforded me a special opportunity to reflect on CUCCIO's past, but also on its present and future. The first generation folks put a strong organization on the national landscape and now the torch has been passed on to the next generation. I have every confidence that CUCCIO is in good hands.

Rick Bunt
Saskatoon
September 2016