

## **AWS Credit Distribution to the CSU**

**Updated 9/17/2019**

### **Overview**

As part of an agreement between Cal Poly and Amazon Web Services, a number of AWS Cloud Service credits have been allocated to the California State University. A clear set of criteria will be defined for credit requests and a governance body will be created to evaluate requests and approve distribution. The following outlines the basic premise for credit requests, evaluation process and governance team composition.

### **Cloud Service Credits Available:**

\$2,000,000.00

### **Usage:**

Credits apply to any of the products in the AWS cloud services portfolio.

Note: The credits cannot be applied to Professional Services.

### **Allocation and Expiration:**

The \$2,000,000 in credits are made available by Amazon to CSU in 3 equal distributions on September 1st of 2017, 2018 and 2019. Each \$667,000 distribution expires two years from the date of availability.

### **Criteria:**

Credit requests with the following characteristics will receive the highest consideration:

Enterprise Impact: Requests that have an Enterprise-wide impact for the University or the CSU. Special consideration will be given to projects that support the CSU's central strategic objective - Graduation Initiative 2025.

Transformational: Requests that propose the use of cloud services to transform operational processes with a productivity or financial gain.

Research and Education: Requests that promote the research and/or education mission of the CSU. Proposals that include student research are encouraged.

### **Training:**

Credit allocation is predicated on the receiving organization committing that key staff members have or will receive both basic cloud and specialized AWS product-specific training.

## **Submitting an Application:**

An application for cloud credits under this program will include the following information:

1. A description of the project for which the credits are requested. This statement should clearly tie the purpose of the project to the areas outlined above under “Criteria”.
2. A high-level project plan, including key milestones, human resources allocated, and costs including both the requested credits and any costs to be borne by the requesting institution.
3. An assessment plan, explaining how the results of the project will be evaluated.
4. A sustainability plan, describing how the institution will continue to support the outcomes of the project once the credits have been exhausted.
5. A dissemination plan for informing CSU campuses and others of the project and its outcomes.
6. An AWS account that credits could be applied to, that is created with an .edu email address and has credit-sharing turned off.
7. A statement of support from the campus-designated ITAC Representative.

## **Credit Allocation Size:**

Any single allocation to a single CSU campus shall not exceed \$50,000. Allocations that fund projects serving multiple campuses or the entire system may be funded up to \$250,000. Most projects can be started with an allocation of \$10,000. An AWS calculator is available to help estimate project needs. <https://calculator.s3.amazonaws.com/index.html>

## **Credit Usage:**

Once a proposal is accepted and a credit code is created, all credits must be expended within one year from the issue of the credits. Unused credits will expire, and cannot be transferred to another project or extended.

## **Governance:**

AWS cloud service credit requests will be evaluated by the ITS Innovation Office. The Cal Poly Digital Transformation Hub will act as the intake and tracking organization for credit requests, usage, success metrics and communications.

## **Application Process:**

1. Applications for credits will be accepted three times a year
2. Each campus may submit at most one proposal per application period
3. Applications must be approved by the campus ITAC member
4. Applications will be evaluated and awarded by the ITS Innovation Office

5. Once an allocation is made for a campus project, the campus may, after one full year, submit a second request for the same project. At most two allocations will be made for any single project.