



**BOARD OF  
REGENTS**  

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**STATE OF IOWA**

# **Iowa Board of Regents**

Implementation Roadmap and Action Plan Overview

**October 2, 2014**

## About the Implementation Roadmap and Action Plan

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### **Approach and Analysis**

The Business Case and Operating Model outlined potential opportunities for improvement. Some of these initiatives can be accomplished relatively quickly, while others could take several months or years to implement. The purpose of the Roadmap is to provide a sequencing of initiatives across a multi-year timeframe and to describe activities and tasks necessary for their implementation. Additional details about each opportunity can be found in the Business Case, Operating Model, and Action Plan.

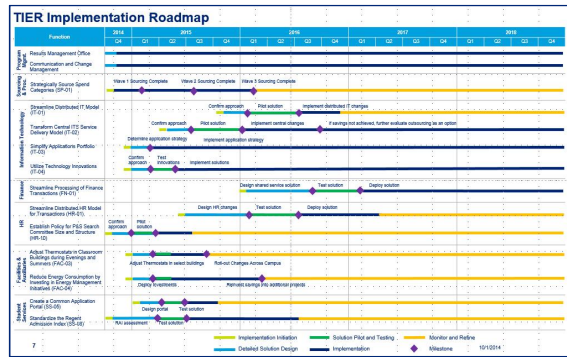
### **Assumptions**

Potential implementation activities and timelines are suggested for the Board's consideration. Additionally, the sequencing does not fully account for the other projects and priorities that might be underway at the universities. The Board will decide which initiatives to pursue.

The individual initiative action plans provide an overview of initial activity sequencing and describes planned implementation activities for TIER. The Board and Universities will finalize the sequencing and develop a project schedule for each initiative during the start of implementation after resources are identified and allocated to the respective opportunities.

# Introduction to the Implementation Roadmap and Action Plan

## Implementation Roadmap



Sequences Phase 2 opportunities across a graphical implementation roadmap

## Action Plan

TIER Phase 2 Action Plan				
Step / Activity Description	Task / Activity Owner	Duration (Weeks)	Universities	Notes
<b>3.0 Finance Shared Services (FM 40)</b>				
Anticipated Owner(s): VP Finance & Administration				
Anticipated Start (Month and Year): December, 2015				
<b>3.1 Implementation Initiation</b>				
3.1.1 Develop implementation kickoff materials including Charter	Finance Lead	2	All	
3.1.2 Identify project champion and supporting team	VP Finance & Adm	1	All	
3.1.3 Finalize project schedule, confirm activity durations, and assign resources	Finance Lead	2	All	
3.1.4 Form finance working groups / implementation teams	Finance Lead	2	All	
3.1.5 Conduct internal project kickoff meeting with project team and working groups	Finance Lead	1	All	
3.1.6 Develop and conduct resource allocation analysis to confirm baseline of effort for central and decentralized finance staff	Finance Lead/HR Team	4	All	Assumes two weeks to develop resource allocation survey, and two week window to administer survey. Will require support from Change Management and Communications team
3.1.7 Analyze resource allocation results to determine implications for future state finance work	Finance Lead/HR Org Support	3	All	
<b>3.2 Detailed Solution Design</b>				

Defines the primary implementation actions and steps required to realize the cost savings or service quality improvements

## Phase 2 opportunities will be either University Led, Consultant Coached, or Consultant Facilitated as they proceed into Implementation

Opportunities fall into three categories for implementation which are further defined below.

Approach	Description	Primary Benefits	When To Use
University or Board Led	The Universities and/or the Board will lead implementation activities defined in the action plan	<ul style="list-style-type: none"> <li>Less expensive from a funding perspective</li> <li>Builds internal ownership and capability</li> </ul>	<ul style="list-style-type: none"> <li>In-house skills exist</li> <li>Internal capacity is available</li> <li>Defined path forward</li> </ul>
Consultant Coached	Universities perform implementation activities, however a consultant may play a defined role in coaching, or further supporting the opportunity	<ul style="list-style-type: none"> <li>Builds internal ownership and capability</li> <li>Incorporates outside perspectives and practices</li> </ul>	<ul style="list-style-type: none"> <li>Internal capacity is available</li> <li>Some internal skills are in place, but additional support or insights are needed</li> </ul>
Consultant Facilitated	The consultant works with a university or Board sponsor, but implementation activities are largely performed or heavily supported by a consultant	<ul style="list-style-type: none"> <li>Provides access to outside skills and experience which may not reside within the universities or the Board</li> <li>Assigns specific resources to the effort which limits internal capacity concerns</li> </ul>	<ul style="list-style-type: none"> <li>Requires deep expertise to implement a complex initiative</li> <li>Internal capacity is not available</li> <li>Sensitive initiative which may have benefits to using a third party</li> </ul>

## Initiatives were grouped into three categories to identify the anticipated approaches the Board could use during implementation

- Five opportunities appear to be best suited for the universities to lead
- Three opportunities appear to be best suited to be university led and consultant coached
- Four opportunities appear to be best suited to be consultant facilitated

ID	Description
University or Board Driven	
HR-10	Establish clear policy for Professional and Scientific staff search committee size and structure
FAC-03	Reduce utilities and operational costs by limiting use of buildings during the summer
FAC-04	Reduce energy consumption by investing in energy management initiatives
SS-05	Create a common application portal
SS-08	Standardize "manual" calculation of Regent Admission Index
Consultant Coached	
IT-03	Streamlining the Applications Landscape
IT-02	Transforming the Central ITS Delivery Model
IT-04*	Using Technology Innovations to reduce Total Cost of Ownership (TCO)
Consultant Facilitated	
HR-01	Revise distributed HR delivery model
FN-01	Revise distributed Finance delivery model
IT-01	Transforming the Distributed IT landscape
SP-01**	Strategically source targeted spend categories

\* Elements of IT-04 can be directly implemented by the University (e.g. printer policy)

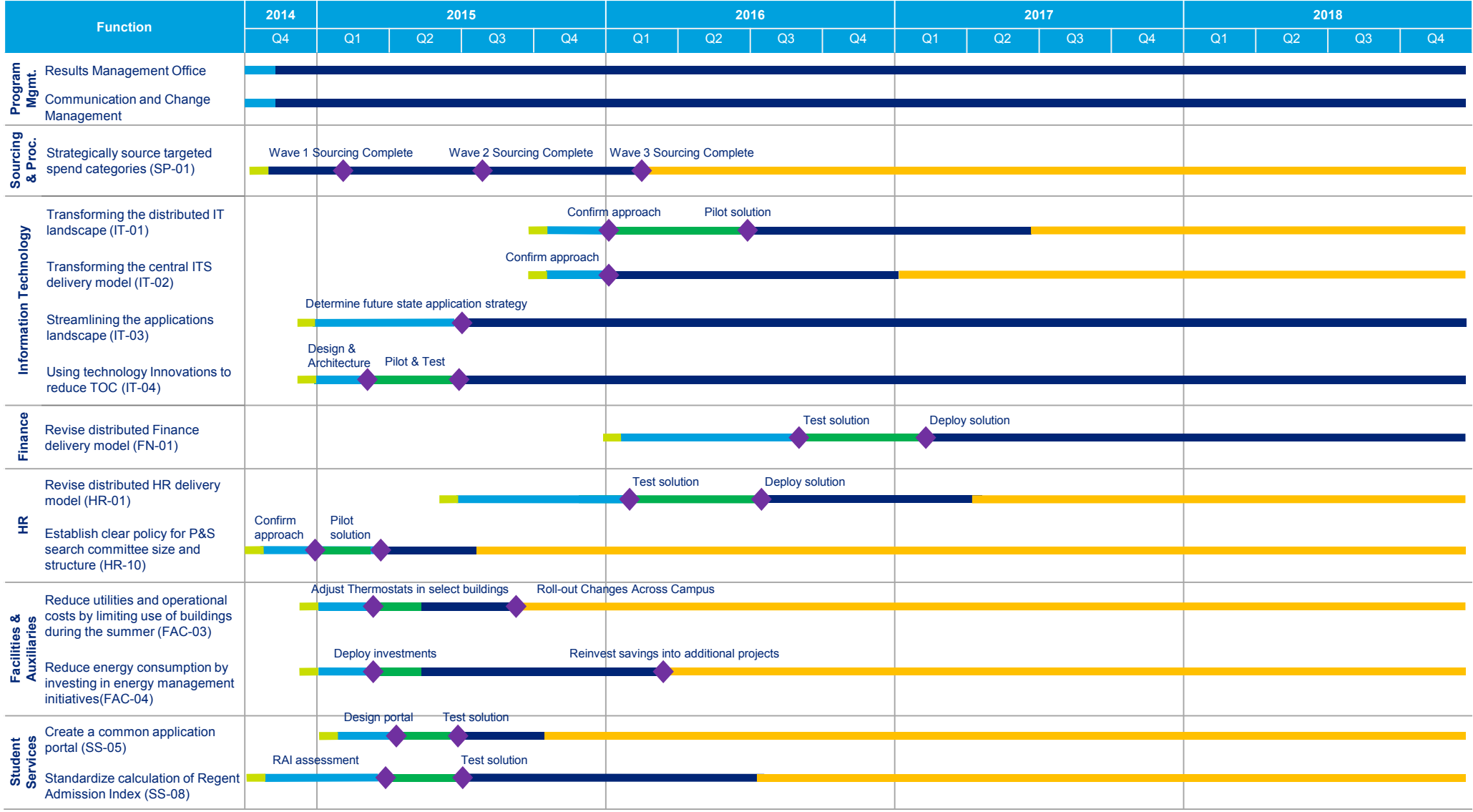
\*\* Opportunity begins as consultant facilitated, but may be able to be shifted to consultant coached or university driven over time

## There are several dependencies to consider as opportunities transition to implementation

Dependencies exist for each business case, however there are several dependencies to consider across all opportunities. A summary is provided below:

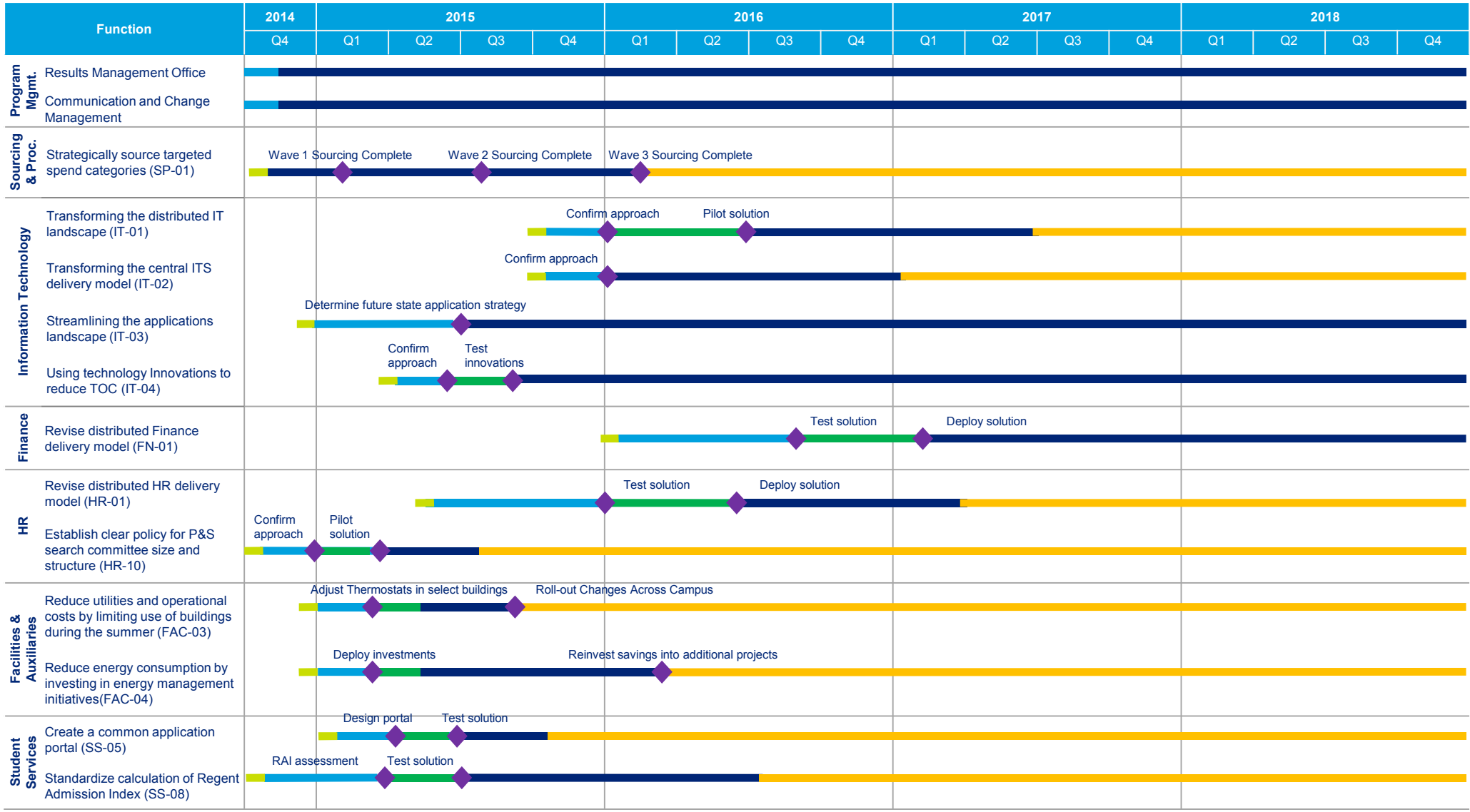
Dependency #	Dependency	Function	Description
1	Board Approval to Proceed	All	<ul style="list-style-type: none"> <li>Board approval is required before proceeding into implementation and could affect the selection of opportunities for implementation</li> </ul>
2	Implementation Approach	All	<ul style="list-style-type: none"> <li>Board and university input is required to determine implementation approach (University Led, Consultant Coached, or Consultant Facilitated) based on available internal resources and capabilities. The determination of how to proceed could impact the roadmap timing</li> </ul>
3	Resource and Funding Availability	All	<ul style="list-style-type: none"> <li>Resource and funding availability from the universities and Board needs to be confirmed for each initiative prior to finalizing the roadmap and action plan</li> </ul>
4	Human Resources support for Transformation	Finance, Information Technology	<ul style="list-style-type: none"> <li>HR team to support organizational transformation will need to be in place prior to being able to engage in organization redesign</li> <li>Making progress relating to HR-01 will aid in effectively supporting other initiatives which require changes to roles or positions</li> </ul>
5	Application Development Support	Finance, HR, Student Services	<ul style="list-style-type: none"> <li>IT resources will need to be identified to support technology changes if the changes will be made using internal technology resources</li> </ul>
6	IT Governance Structure	Information Technology	<ul style="list-style-type: none"> <li>Prior to rationalizing applications within and across universities, governance structures (e.g. CIO Council) and related positions should be established to support the development of the IT vision</li> </ul>

# TIER Implementation Roadmap



■ Implementation Initiation     ■ Solution Pilot and Testing     ■ Monitor and Refine  
■ Detailed Solution Design     ■ Implementation     ◆ Milestone

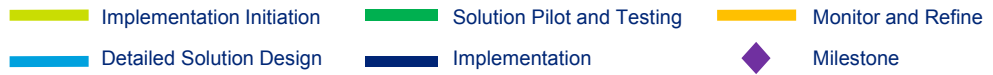
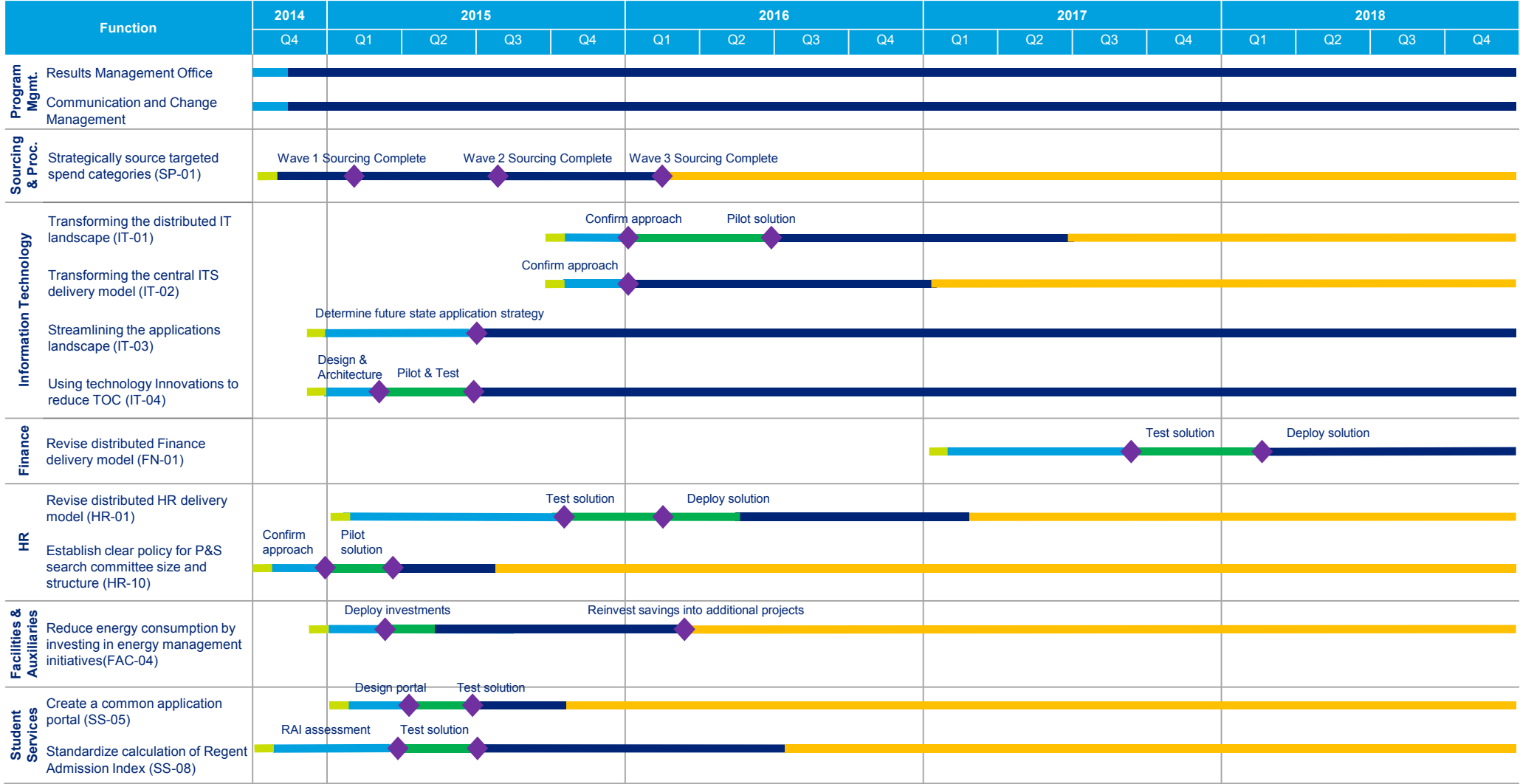
# TIER Implementation Roadmap - UNI



■ Implementation Initiation     ■ Solution Pilot and Testing     ■ Monitor and Refine  
■ Detailed Solution Design     ■ Implementation     ◆ Milestone



# TIER Implementation Roadmap - ISU



# TIER Implementation Roadmap - SUI

