	TIER Phase 2 Action Plan				
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ID	**Step / Activity Description**	**Task / Activity Owner**	**Potential Duration (Weeks)**	**Universities**	**Notes**
1.0 Establish Results Management Office					
Anticipated Owner(s): Results Management Office Lead					
Anticipated Start (TBD)					
1.1	**RMO Implementation**				
1.1.1	Establish Governance structures for Implementation and identify resources to support these efforts	RMO Lead	2	RMO	
1.1.2	Develop implementation kickoff materials for leads, including Charter for TIER program	RMO Lead	2	RMO	
1.1.3	Develop templates and materials (e.g., status reports, Risk Log, Project Plan, Results Tracker)	RMO Lead	2	RMO	
1.1.4	Establish cadence of project status meetings	RMO Lead	1	RMO	
1.1.5	Develop and refine TIER program work plan	RMO Lead	2	RMO	
1.1.6	Onboard Change Management and Communication staff	RMO Lead	1	RMO	
1.1.7	Conduct Program Kickoff Meeting	RMO Lead	1	RMO	
1.2	**Transition Planning**				
1.2.1	Conduct Opportunity Transition Meetings with Opportunity Leads	RMO Lead	1	RMO	
1.2.2	Assist with Opportunity Planning and Initiation	RMO Lead	3	RMO	Assumes RMO will provide templates/support for Charter and project plan development to leads for each opportunity
1.2.3	Review and approve Opportunity Launch Package	RMO Lead	1	RMO	
1.3	**Change Management & Communications**				
1.3.1	Develop Communication Plan	Communication Lead	2	RMO	
1.3.2	Conduct Stakeholder Analysis	Change Lead	2	RMO	
1.3.3	Development Change Management Plan	Change Lead	2	RMO	
1.4	**Ongoing Management**				
1.4.1	Monitor and track Opportunity Progress	RMO Lead	Ongoing	RMO	
1.4.2	Monitor and manage Results Tracker	RMO Lead	Ongoing	RMO	
1.4.3	Provide status updates to the Board of Regents	RMO Lead	Ongoing	RMO	
1.4.4	Draft Communications according to communication plan	Communication Lead	Ongoing	RMO	
1.4.5	Deliver communications (e-mail, open forums, etc.) to target audiences	Communication Lead	Ongoing	RMO	
1.4.6	Update communications and change plan as needed	Communication/Chang	Ongoing	RMO	
1.5	**Project Close Out**				
1.5.1	Review Opportunity Outputs and Results	RMO Lead	Ongoing	RMO	
1.5.2	Coordinate lessons learned	RMO Lead	Ongoing	RMO	
1.5.3	Report results to Board and constituents	RMO Lead	Ongoing	RMO	
2.0 Strategically source targeted spend categories (SP-01)					
Anticipated Owner(s): University Procurement Leads					
Anticipated Start (TBD)					
2.1	**Implementation Initiation**				
2.1.1	Develop implementation kickoff materials including Charter	Procurement Lead	1	All	
2.1.2	Define and align on categories of spend	Procurement Lead	1	All	The categories should be identified by placing a priority on those categories common across universities
2.1.3	Assemble category teams	Procurement Lead	2	All	Teams should consist of individuals from the procurement department and the end-user community
2.1.4	Conduct project kickoff meeting	Procurement Lead	3	All	
2.2	**Implementation Solution Design**			All	
2.2.1	Develop detailed cost baseline	Procurement Lead	4	All	The cost baseline should detail unit volume and unit pricing. Data should come from transaction files (e.g. PO/P-Card, etc.) and supplier RFIs if necessary
2.2.2	Validate category demand drivers	Procurement Lead	4	All	
2.2.3	Validate end-user buying process	Procurement Lead	4	All	Category-specific buying processes should be documented in the event that if new supplier solutions come with new buying processes, the new process can be communicated as part of the change management process
2.2.4	Model internal and external costs	Procurement Lead	4	All	
2.2.5	Develop Total Cost Model	Procurement Lead	4	All	The cost should be modeled in order to identify opportunities for cost reduction that are non-price related. A key internal cost includes inventory management (e.g. storage, handling, spoilage)
2.2.6	Outline category specifications and requirements	Procurement Lead	4	All	

	TIER Phase 2 Action Plan

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
2.2.7	Assess supplier markets	Procurement Lead	4	All	This is a category-specific review of both incumbent and non-incumbent suppliers that could participate in the RFP process
2.2.8	Define supply base	Procurement Lead	4	All	This is the category-specific list of suppliers narrowed down to participate in the RFP process
2.2.9	Perform initial supplier assessments	Procurement Lead	4	All	
2.2.10	Finalize strategic sourcing strategy	Procurement Lead	8	All	It's important to gain alignment with end users and other key constituents on the strategies developed
2.2.11	Develop bidding strategies	Procurement Lead	4	All	
2.2.12	Communicate strategy to stakeholders	Procurement Lead	4	All	
2.3	**Implement Solution**				
2.3.1	Develop supplier bid packages	Procurement Lead	8	All	
2.3.2	Execute bid packages	Procurement Lead	8	All	
2.3.3	Analyze responses	Procurement Lead	8	All	
2.3.4	Develop negotiation strategies	Procurement Lead	8	All	
2.3.5	Develop Recommendations for Supplier Awards	Procurement Lead	4	All	
2.4	**Monitor Solution and Ongoing Project Management**				
2.4.1	Provide status reports to TIER RMO during implementation	Procurement Lead	Ongoing		
2.4.2	Develop savings tracking process and template	Procurement Lead	3	All	The savings tracking should be based on the baseline unit costs and unit volumes identified in 2.2.1
2.4.3	Report savings to RMO	Procurement Lead	3	All	
2.4.4	Institutionalize sourcing strategy	Procurement Lead	Ongoing	All	

3.0 Transforming the Distributed IT Landscape (IT-01)

Anticipated Owner(s): University CIOs and Distributed IT Leaders

Anticipated Start (TBD)

ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
3.1	**Implementation Initiation**				
3.1.1	Identify project leads and supporting project teams	Project owner(s)	1	All	
3.1.2	Develop implementation kickoff materials including project charter	Project lead(s)	1	All	The project charter should clearly identify key objectives, project team, key milestones and high-level plan, and should leverage the business case documents as a key source
3.1.3	Finalize project schedule, confirm activity durations, and assign resources	Project lead(s)	1	All	
3.1.4	Conduct internal project kickoff meetings	Project lead(s)	1	All	Separate meetings may be required for team members and project sponsors/owners
3.1.5	Determine teams within scope of solution design	Project teams	1	All	Review Phase 2 data collected related to key IT capability areas
3.2	**Detailed Solution Design - Data Center / Server Room Landscape Optimization**				
3.2.1	Validate and update the distributed IT server room inventory	Server Team	2	All	Leverage data collected during Phase II of the TIER study
3.2.2	Clearly determine current state financials related to server room support	Server Team	2	All	Utilize Phase 2 data collected and update to clearly determine individual server room spending - opex and capex; Conduct discussions with finance & accounting leaders to determine full TCO for server rooms
3.2.3	Inventory key server rooms	Server Team	2	All	Determine key supported applications, servers, networking equipment, AC, UPS etc.
3.2.4	Determine wave strategy for migration to central ITS data centers	Server Team	2	All	Wave strategy will be based on complexity / risk profile of migration
3.2.5	Develop server room migration plan	Server Team	2	All	Based on waves determined above
3.3	**Detailed Solution Design - Organization Design**				
3.3.1	Update / finalize end-user computing profiles for teams within scope	Project teams	2	All	Clearly determine number of end-user devices being supported, help desk protocols/tools used etc.
3.3.2	Determine support metrics for in-scope teams	Project teams	2	All	Support metrics include help desk metrics, incidents, SLAs, servers, etc., related to IT capabilities like server management, end user support, network management, IT help desk.
3.3.3	Clearly determine current state financials	Project teams	2	All	Utilize Phase 2 data collected and update to clearly indicate operational and capital spending for key capabilities in focus
3.3.4	Review and catalog distributed IT processes supporting in-scope IT capabilities	Project teams	2	All	Assuming relevant processes are documented and documentation is requested
3.3.5	Review distributed IT help desk and operational technology platforms currently supported, for determining if changes are required and when the transitions will occur	Project teams	2	All	
3.3.6	Update and document central ITS processes	Project teams	2	All	Review if changes are necessary to support additional distributed groups
3.3.7	Design the future-state central ITS organization to address increased support to the distributed	Project teams	4	All	
3.3.8	Develop transition approach for in-scope IT teams and determine waves of transition and associated timing	Project teams	2	All	Waving strategy will vary based on complexity / level of acceptance etc. Pilot candidates should also be chosen at this time

	TIER Phase 2 Action Plan

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
3.3.9	Draft service level agreements (SLAs) for common IT capability support provided to the distributed	Project teams	2	All	
3.3.10	Update metrics and reporting procedures for central ITS performance management	Project teams	2	All	
3.3.11	Develop proposed chargeback model changes for key in-scope services	Project teams	2	All	These are the services that will be transitioned campus-wide
3.3.12	Develop training plan for central ITS and transitioning distributed IT personnel	Project teams	2	All	
3.3.13	Develop change management plan for colleges / departments / administrative groups	Project teams	2	All	
3.4 Solution Pilot and Testing					
3.4.1	Transition services for the distributed IT group selected to be pilot customer(s) for common IT capabilities	Project teams	4	All	
3.4.2	Test new technology and/or platforms required to support distributed IT	Project teams	4	All	
3.4.3	Document support or deployment issues and revise approach if necessary	Project teams	4	All	
3.4.4	Refine and document any changes required to new central ITS processes	Project teams	4	All	
3.5 Implementation					
3.5.1	Update roles and responsibilities for ITS personnel	Project team	2	All	
3.5.2	Create job descriptions for transitioning distributed IT staff	Project team	2	All	
3.5.3	Onboard in-scope distributed IT personnel to central ITS organization	Project lead(s)	Ongoing	All	Follow wave approach to transition select distributed IT groups based on complexity, level of acceptance etc.
3.5.4	Charge / bill distributed IT groups for the services supporting the common IT capabilities according to financial calculations	Central ITS	Ongoing	All	Follow wave approach to transition select distributed IT groups based on complexity, level of acceptance etc.
3.5.5	Modify central ITS technology platforms as necessary to support distributed groups	Technology group	4	All	
3.5.6	Adopt redesigned processes for central ITS	Central ITS	3	All	
3.5.7	Publish updated process documentation for central ITS	Central ITS	1	All	
3.5.8	Implement Server Room Migrations per developed plan	Server / technology group	Ongoing	All	Timing will vary depending on size of server room and complexity of servers in the environment.
3.5.9	Deploy any systems required to track or monitor performance metrics / SLAs	Project team	Ongoing	All	
3.6 Monitor and Refine Solution					
3.6.1	Provide status reports to TIER RMO during implementation	Project lead(s)	Ongoing	All	
3.6.2	Report performance metrics proactively and adhere to all SLAs	Central ITS	Ongoing	All	Necessary as distributed IT groups will rely more on central ITS to provide some services
3.6.3	Report savings to RMO	Project lead(s)	Ongoing	All	
3.6.4	Follow change management plan to ease transition with colleges / departments / administrative groups	Project lead(s)	Ongoing	All	
4.0 Transforming the Central ITS Delivery Model (IT-02)					
Anticipated Owner(s): University CIOs					
Anticipated Start (TBD)					
4.1 Implementation Initiation					
4.1.1	Identify project leads and supporting project teams	Project owner(s)	1	All	
4.1.2	Develop implementation kickoff materials including project charter	Project lead(s)	1	All	The project charter should clearly identify key objectives, project team, key milestones and high-level plan, and should leverage the business case documents as a key source
4.1.3	Finalize project schedule, confirm activity durations, and assign resources	Project lead(s)	1	All	
4.1.4	Conduct internal project kickoff meetings	Project lead(s)	1	All	Separate meetings may be required for team members and project sponsors/owners
4.2 Detailed Solution Design - Organization Design					
4.2.1	Conduct detailed activity analysis for central ITS personnel as baseline for future state operating model design	Project team	3	All	Review against historical data like time data or project demand data, to verify / refine for accuracy
4.2.2	Review Phase 2 design suggestions	Project team	2	All	To be used as baseline for future-state design, but capability enhancements will enable additional opportunities too
4.2.3	Analyze central ITS activity analysis data to enable future-state design	Project team	2	All	Review team overlaps highlighted in Phase II, to determine appropriate future-state design
4.2.4	Design the future-state ITS operating model / organizational model and conduct resource allocation analysis	Project team	2	All	Organize related capability resources so that they report under only one team with the central ITS organization
4.2.5	Develop transition plan for organizational changes	Project team	2	All	
4.3 Detailed Solution Design - Capability Enhancement					
4.3.1	Analyze time reporting practices for central ITS and determine areas of improvement to align more closely with standard practices	Project team	3	UNI + ISU	SUI has time reporting practices enabled for central ITS; Time reporting should enable understanding how employees are spending their time, with appropriate audit capabilities to ensure that time is correctly reported
4.3.2	Gather data on current in-flight and other approved projects	Project team	2	All	

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
4.3.3	Analyze current IT governance practices and procedures	Project team	2	All	Modifications to include requiring business cases for projects over a certain dollar amount, and requiring documentation on how the project aligns with university mission etc. (as part of strategic planning)
4.3.4	Update chargeback model and rates as necessary to cover all customer services provided by central ITS	Project team	2	All	Related to services like ADM that are not charged back or partially charged back today; The review needs to determine current proportion of cost recovery
4.3.5	Analyze sourcing or project staffing procedures and determine areas of improvement to better support development needs	Project team	2	All	
4.4 Solution Pilot and Testing - Capability Enhancement					
4.4.1	Enable enhanced time-reporting practices - across pilot group	Project team	6	All	Understand where time is being spent and how to determine reallocation potential for the future
4.4.2	Enable enhanced governance procedures - across pilot group	Project team	6	All	Determine if current projects should be deferred until approved business cases are available
4.4.3	Enable changes to the chargeback models as possible - across pilot group	Project team	6	All	
4.5 Implementation					
4.5.1	Institutionalize updated governance process requiring business cases for significant projects	Project team	3	All	Focus mainly on IT projects (above a certain threshold) prioritizing positive return or mandatory projects
4.5.2	Institutionalize enhanced time-reporting practices - across the IT organization	Project team	3	UNI + ISU	
4.5.3	Institutionalize chargeback changes as possible	Project team	3	All	
4.5.4	Implement transition plan for organizational changes based on timing developed within the plan	Project team	6	All	
4.5.5	Deploy system changes required to track / monitor performance metrics / SLAs	Project team	3	All	
4.5.6	Leverage systems and data to proactively report on performance	Project team	Ongoing	All	
4.6 Monitor and Refine Solution					
4.6.1	Provide status reports to TIER RMO during implementation	Project lead(s)	Ongoing	All	
4.6.2	Report performance metrics proactively and adhere to all SLAs	Central ITS	Ongoing	All	
4.6.3	Complete study on leveraging 3rd party support and costs benefits	Project team	Long-Term	All	As needed, if central ITS savings below plan
4.6.4	Report savings to RMO	Project lead(s)	Ongoing	All	
5.0 Streamlining the Applications Landscape (IT-03)					
Anticipated Owner(s): CIOs					
Anticipated Start (TBD)					
5.1 Implementation Initiation & Governance Establishment					
5.1.1	Identify project leads and supporting project teams	Project owner(s)	Varies	All	
5.1.2	Develop implementation kickoff materials including project charter	Project lead(s)	1	All	The project charter should clearly identify key objectives, project team, key milestones and high-level plan, and should leverage the business case documents as a key source
5.1.3	Finalize project schedule, confirm activity durations, and assign resources	Project lead(s)	1	All	
5.1.4	Conduct internal project kickoff meetings	Project lead(s)	1	All	Separate meetings may be required for team members and project sponsors/owners
5.1.5	Develop charter for new CIO Council for cross-university governance	Project lead(s)	2	All	Refer to details in the IT-03 business case on role / responsibilities; Assumed CIOs will also keep key distributed IT leaders informed / engaged
5.1.6	Determine CIO Council members and invite to participate	Project lead(s)	1	All	Determine regular cadence of discussions related to the applications architecture
5.2 Detailed Solution Design					
5.2.1	Determine owner(s) of the applications catalog by university	Project team	2	All	Each university should determine an owner who is responsible for ongoing maintenance and validity of the applications information within the applications catalog; A preliminary version was developed as part of Phase 2 for use within this project
5.2.2	Review / Update catalog with any missing information or new applications	Project team	4	All	This should include license renewal, missing TCO information for applications, and expand the list of applications
5.2.3	Gather list of key current active and approved application development projects	Project team	2	All	Cross-reference across the applications catalog
5.2.4	Develop a maintenance process for the application catalog	Project team	2	All	Maintenance process includes what must be done at regular intervals to keep the application catalog relevant and up-to-date. Can include removing retired applications, checking capabilities still apply to current applications, adding new applications etc.
5.2.5	Draft updates required for university governance to support active governance for application streamlining	Governance lead	2	All	Will require consensus from IT and business leaders on standardizing applications across key areas to achieve architectural, licensing and implementation synergies
5.2.6	Develop a future-state applications strategy across the three universities focusing on key opportunity areas	Project team	10	All	Assume application demographics will play a role in prioritization in addition to license information and upgrade cycles - health of the application, technology platform, TCO, age etc. Primary focus on Facilities, Library mgmt., Infrastructure, learning mgmt., and Student systems

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
5.2.7	Review and confirm the future-state applications strategy	Project team	4	All	Review broadly across each university, and refer to enterprise architecture and standards, that may need to be modified
5.2.8	Investigate active project opportunities for streamlining such as Student Information Systems across universities	Project lead(s)	Varies	All	IT-03 business case pointed to some potential areas of opportunity, which needs to be reviewed against the applications strategy and active project candidates started in these areas
5.2.9	Conduct fit-gap analysis for active project opportunities to assess trade-offs with using one existing platform over another university-wide	Project team	Varies	All	
5.3	**Solution Pilot and Testing**				
5.3.1	Perform a test run of the maintenance process for the application catalog	Project team	2	All	
5.3.2	Select a lower impact area of duplication to begin application streamlining discussions	Project team	2	All	Candidates include learning management, library management, facilities management, IT infrastructure and operations
5.3.3	Conduct meetings of the CIO Council	Project lead(s)	2	All	Focused around one key area of opportunity and architectural governance
5.3.4	Conduct workshops on sub-application areas to determine how to achieve architectural, licensing and implementation synergies	Project lead(s)	4	All	These should be follow-ups from the CIO Council discussions
5.3.5	Test the updated university and cross-university architectural governance procedures aimed at application streamlining through meetings of governance bodies	Governance lead	4	All	
5.3.6	Determine refinements to maintenance and governance processes	Project lead(s)	2	All	Based on the feedback from pilot and testing
5.4	**Implementation - Ongoing Active Governance and / or active projects**				
5.4.1	Conduct regular meetings of the CIO Council	Project lead(s)	Ongoing	All	Key topics will include prioritizing applications streamlining projects, reviewing status of projects and recommending deferring projects that don't fit the long-term applications strategy
5.4.2	Operationalize the application catalog maintenance process	Project team	Ongoing	All	
5.4.3	Conduct governance meetings across each university to support CIO Council meetings and decisions	Governance lead	Ongoing	All	
5.4.4	Conduct regular workshops for application areas with streamlining opportunities	Project team	Ongoing	All	Determine key next steps and owners for next steps
5.4.5	Keep long-term applications roadmap / strategy periodically updated across the universities	Project team			
5.5	**Monitor and Refine Solution**				
7.5.1	Provide status reports to TIER RMO during implementation	Project lead(s)	Ongoing	All	
7.5.2	Update charter and status for CIO Council	Project lead(s)	Varies	All	
7.5.5	Update the application catalog, required maintenance process and applications dashboard / heat-map annually	Project team	Ongoing	All	The applications heat-map can be a mechanism to measure positive changes to the applications landscape
7.5.6	Report savings to RMO	Project lead(s)	Long-Term	All	
6.0 Using Technology Innovations to reduce Total Cost of Ownership (TCO) (IT-04)					
Anticipated Owner(s): CIOs					
Anticipated Start (TBD)					
6.1	**Implementation Initiation**				
6.1.1	Identify project leads and supporting project teams	Project owner(s)	1	All	Consider two teams - one focused on the "Print Green" initiative and the other on the "Desktop/VDI Transformation" initiative
6.1.2	Develop implementation kickoff materials including project charter	Project lead(s)	1	All	The project charter should clearly identify key objectives, project team, key milestones and high-level plan, and should leverage the business case documents as a key source
6.1.3	Finalize project schedule, confirm activity durations, and assign resources	Project lead(s)	1	All	
6.1.4	Conduct internal project kickoff meetings	Project lead(s)	1	All	Separate meetings may be required for team members and project sponsors/owners
6.2	**Detailed Solution Design - "Print Green" Initiative**				
6.2.1	Refine/update local and network printer counts and financials	Printer team	2	All	Utilize the printer counts gathered in Phase 2, but update to cover any other groups / printers not covered during Phase 2, include model details as possible
6.2.2	Review printer best practices from selected departments / colleges	Printer team	2	All	Review best practices from selected colleges / departments, across all three universities, that have had success with reducing local printer usage
6.2.3	Review and confirm printing data to better understand printer usage patterns	Printer team	2	All	Leverage Paper cut reports and data, and seek to extrapolate to remaining network printers
6.2.4	Analyze local printer usage trends to determine network printer refresh changes	Printer team	2	All	Assumed that ongoing (status quo) network printer refreshes / updates can be optimized to also focus on areas of opportunity for local printer reduction
6.2.5	Determine university specific incentives and communications activities that will help reduce local printer usage and paper consumption	Printer team	2	All	
6.2.6	Develop the "Print Green" strategy and plan for each of the universities incorporating these incentives, and communications activities	Printer team	2	All	Will require change management help

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6.2.7	Develop a change management plan to complement the "Print Green" strategy	Printer team	2	All	
6.3	**Detailed Solution Design - "Desktop Transformation" Initiative**				
6.3.1	Update detailed desktop counts and refresh rate information	Desktop team	2	All	Review the detailed desktop information gathered during Phase 2, for any changes / updates, focusing on any additional assets that may not be covered within existing inventory
6.3.2	Confirm desktop financial profile and baseline	Desktop team	2	All	Validate the key financial baseline associated with the desktop landscape across each university, including refresh rates, sources of funding, historical spending etc.
6.3.3	Draft initial requirements for VDI based on known usage profile data	Desktop team	2	All	While ISU has defined requirements, it may be still beneficial to review and update. UNI and SUI should create preliminary requirements. Segment by non-persistent and persistent users.
6.3.4	Conduct working sessions with key distributed IT teams to further flesh out requirements and service level expectations	Desktop team	2	All	Using Phase 2 data, conduct working discussions with key distributed groups to start identifying additional requirements / needs, particularly for non-persistent users initially
6.3.5	Investigate licensing implications for key software packages	Desktop team	4	All	Determine licensing impacts for key applications that may be required to be admin-installed
6.3.6	Update VDI requirements on usage profile data and user group discussions	Desktop team	2	All	
6.3.7	Develop high-level "user waves" for VDI - across the different user groups	Desktop team	4	All	Initial waves should primarily include non-persistent users, along with any persistent users with lower complexity of needs
6.3.8	Determine the best target VDI architecture to match the environment and usage profiles	Desktop team	4	UNI + SUI	ISU already has a well defined architecture, hence not included within this activity
6.3.9	Perform a vendor selection for VDI software using requirements and budgeted costs	Desktop team	Varies	UNI + SUI	
6.3.10	Determine necessary upgrades (if any) for the central data center to support VDI	Desktop team	2	UNI + SUI	
6.3.11	Develop the plan to perform a phased rollout of VDI based on desktop refresh / end of life / "user waves"	Desktop team	2	All	Choose a college or department for initial "pilot testing"
6.3.12	Develop training plan for students, faculty and administrative users on how to use VDI	Desktop team	2	All	
6.3.13	Develop change management plan for increased use of VDI	Desktop team	2	All	
6.3.14	Determine chargeback model for VDI services	Desktop team	2	UNI + SUI	
6.4	**Solution Pilot and Testing - "Desktop Transformation" Initiative**				
6.4.1	Procure VDI hardware, software, including end-points	Desktop team	Varies	UNI + SUI	Determine a small number of end-points that can be used for the pilot
6.4.2	Install VDI hardware, software in central data center	Desktop team	2	UNI + SUI	
6.4.3	Roll-out to pilot group	Desktop team	Varies	UNI + SUI	
6.4.4	Monitor performance and survey users for satisfaction compared to desktops	Desktop team	8	UNI + SUI	
6.4.5	Modify VDI architecture / performance characteristics etc. based on trial run and user feedback	Desktop team	8	UNI + SUI	
6.5	**Implementation - Print Green and Desktop Transformation**				
6.5.1	Rollout the Print Green implementation Plan	Printer team	2	All	
6.5.2	Modify configuration of all network printers to enhance duplex printing and other default toner saving settings	Printer team	Varies	All	
6.5.3	Roll out communications plan with incentives for printer users in distributed groups	Printer team	Varies	All	
6.5.4	Follow VDI deployment plan using production waves	Desktop team	Varies	All	Waves within each university deployment will follow the plan developed for a phased roll-out. Sequencing of the roll-out will depend on factors such as usage profiles and desktops approach end of life
6.5.5	Update chargeback model for VDI (if necessary)	Desktop team	Varies	All	
6.5.6	Agree on license agreements and any modifications necessary for software deployed on VDI machines (if necessary)	Desktop team	Varies	All	
6.5.7	Follow change management plan for increased use of VDI	Desktop team	Ongoing	All	
6.6	**Monitor and Refine Solution**				
6.6.1	Provide status reports to TIER RMO during implementation	Project lead(s)	Ongoing	All	
6.6.2	Update desktop counts and TCO as VDI plan is put in place	Desktop team	Ongoing	All	
6.6.3	Monitor network printing metrics from Paper cut	Printer team	Ongoing	All	
6.6.4	Monitor usage levels and statistics for newly deployed VDI	Desktop team	Ongoing	All	
6.6.5	Adjust VDI architecture based on usage patterns and performance	Desktop team	Ongoing	All	
6.6.6	Report savings to RMO	Project lead(s)	Ongoing	All	
7.0 Revise distributed Finance delivery model (FN-01)					
Anticipated Owner(s): VP Finance & Administration					
Anticipated Start (TBD)					

TIER Phase 2 Action Plan

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
7.1	**Implementation Initiation**				
7.1.1	Develop implementation kickoff materials including Charter	Finance Lead	2	All	
7.1.2	Identify project champion and supporting team	VP Finance & Admin	1	All	
7.1.3	Finalize project schedule, confirm activity durations, and assign resources	Finance Lead	2	All	
7.1.4	Form finance working groups / implementation teams	Finance Lead	2	All	
7.1.5	Conduct internal project kickoff meeting with project team and working groups	Finance Lead	1	All	
7.1.6	Develop and conduct resource allocation analysis to confirm baseline of effort for central and decentralized finance staff	Finance Lead/HR Org Support 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. Survey should be coordinated with other business cases
7.1.7	Analyze resource allocation results to determine implications for future state finance work	Finance Lead/HR Org Support Team	3	All	Will require support from HR workforce planning professionals
7.2	**Detailed Solution Design**				
7.2.1	Re-design processes through finance working groups (e.g., Travel & Expense, Accounts Payable, Procurement, Accounting) Services.	Finance Lead/Finance Working Group	10	All	Refer to Finance business cases for suggested list of process improvement areas at each university. Each university should consider starting with Travel & Expense. Duration of working group engagement will be contingent on number of processes reviewed and availability of participants.
7.2.2	Identify and update affected policies based on planned process and organizational changes	Finance Lead/Finance Working Group	2	All	
7.2.3	Develop process manuals and customer intake guidelines for finance customer service professionals	Finance Lead	4	All	Assumes service center leadership can play role in developing customer service guidelines
7.2.4	Confirm future state organization structure and reporting lines	Finance Lead	2	All	
7.2.5	Determine future state staffing levels	Finance Lead	2	All	Future state staffing levels will be influenced by the resource allocation analysis, anticipated volume of key processes, and technology and process improvements.
7.2.6	Develop recruitment plan for new finance shared service staff	Finance Lead/HR Org Support Team	1	All	Assumes support from HR to develop and execute recruitment plan
7.2.7	Develop job descriptions for shared services staff	Finance Lead/HR Org Support Team	1	All	Assumes support from HR to develop job descriptions
7.2.8	Develop workforce transition strategy and approach including timing for reaching planned staffing levels	Finance Lead/HR Org Support Team	2	All	Resource allocation results will inform workforce planning strategy.
7.2.9	Develop training plan and material for shared services staff and retained staff	Finance Lead/HR Org Support Team	2	All	Need to determine whether HR/Training resources will be available to support training development.
7.2.10	Contribute to the overall TIER change management and communication plan	Finance Lead	Ongoing	All	
7.2.11	Identify technology changes required to existing tools (technology needs are different for each university - refer to Finance Business Cases)	Finance Lead/IT support team	4	All	Assumes internal IT resources will be available to assist with technology needs assessment and requirement building
7.2.12	Conduct requirements analysis for major technology changes, including CRM	Finance Lead/IT support team	4	All	Assumes internal IT resources will be available to assist with technology needs assessment and requirement building.
7.2.13	Conduct technology resource planning for in-house changes or select vendor to support	Finance Lead/IT support team/CIO	2	All	
7.2.14	Confirm performance measures and key performance indicators (KPIs)	Finance Lead	2	All	Need to assess availability and accuracy of data to track metrics. Refer to FN-01 for sample KPIs
7.2.15	Develop Service Catalog and agree on Service Level Agreements (SLAs)	Finance Lead	3	All	
7.2.16	Conduct space planning for finance shared service staff	Finance Lead/Facilities support	4	All	Assumes facilities will assist in assessing space impact and potential cost implications.
7.2.17	Develop technology solutions	IT Team	Varies	All	
7.3	**Solution Pilot and Testing**				
7.3.1	Test future state changes using a pilot approach across colleges and departments (Refer to Implementation 7.4 for sample tasks)	Finance Lead	10	All	Depending on Pilot approach, could consider piloting services to Central Administrative units first
7.3.2	Test technology solutions	IT Team	Varies	All	
7.3.3	Revise approach and solution as necessary based on pilot	Finance Lead/IT Team	2	All	
7.4	**Implementation**				
7.4.1	Recruit and hire new staff		10	All	Assumes HR will provide recruitment support
7.4.2	Onboard new staff		2	All	

	TIER Phase 2 Action Plan			

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
7.4.3	Conduct training for new staff		1	All	
7.4.4	Roll out updated policies and procedures to campus		2	All	
7.4.5	Distribute procedure manuals and customer intake guidelines to customer service representatives		1	All	
7.4.6	Execute workforce transition plan		Varies	All	Workforce transition duration will depend on agreed upon approach (natural attrition, phased retirement, etc.)
7.4.7	Conduct training and knowledge transfer for retained staff		2	All	
7.4.8	Go-live with new technology systems		Varies	All	
7.4.9	Conduct space transition		3	All	
7.4.10	Establish dashboard for tracking and monitoring SLAs and KPIs		2	All	
7.4.11	Go-live with new Shared Services Operations		1		
7.5	**Monitor and Refine Solution**				
7.5.1	Provide status reports to TIER RMO during implementation		Ongoing	All	
7.5.2	Collect performance metrics and compile savings estimates and report to RMO		Ongoing	All	
7.5.3	Monitor SLAs and KPIs		Ongoing	All	
7.5.4	Participate in continuous process improvement sessions		Ongoing	All	
7.5.5	Monitor and address customer feedback		Ongoing	All	
8.0 Revise distributed HR delivery model (HR-01)					
Anticipated Owner(s): VP HR					
Anticipated Start (Month and Year): January 2015					
8.1	**Implementation Initiation**				
8.1.1	Develop implementation kickoff materials including Charter	VP HR	2	All	
8.1.2	Identify project champion and supporting team	VP HR	1	All	
8.1.3	Finalize project schedule, confirm activity durations, and assign resources	HR Lead	2	All	
8.1.4	Form HR working groups / implementation teams	HR Lead	2	All	
8.1.5	Conduct internal project kickoff meeting with project team and working groups	HR Lead	1	All	
8.1.6	Develop and conduct resource allocation analysis to confirm baseline of effort for central and decentralized finance staff	HR Lead	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. Survey should be coordinated with other business cases
8.1.7	Analyze resource allocation results to determine implications for future state finance work	HR Lead	3	All	
8.2	**Detailed Solution Design**				
8.2.1	Re-design processes through HR working groups as needed. Refer to HR business cases for suggested list of process improvement areas at each university.	HR Lead/HR working group	10	All	Duration of working group engagement will be contingent on number of processes reviewed and availability of participants. Recruitment is a process that should be considered for process redesign first (need to integrate with HR-10 implementation). Assumes level of effort will be different at each institution - effort at SUI will not be as great due to limited process redesign recommendations
8.2.2	Identify and update affected policies based on planned organizational changes	HR Lead/HR working group	2	All	Refer to HR-01 business case for suggested changes
8.2.3	Develop process manuals for HR staff	HR Lead	4	All	
8.2.4	Develop customer intake guidelines for service center staff	HR Lead	3	ISU	
8.2.5	Confirm future state organization structure and reporting lines	VP HR/HR Lead	2	All	
8.2.6	Finalize delineation of responsibilities between Central HR, HR Liaisons, Service Center, Departments, and Compliance	VP HR/HR Lead	2	All	
8.2.7	Determine future state staffing levels	VP HR/HR Lead	2	All	
8.2.8	Develop recruitment plan for new staff	HR Lead/Recruitment	1	UNI + ISU	Assumes HR will develop and execute recruitment plan.
8.2.9	Develop job descriptions for new staff positions	HR Lead/Recruitment	1	UNI + ISU	Assumes HR will develop and execute recruitment plan.
8.2.10	Develop workforce transition strategy and approach including timing for reaching planned staffing levels	HR Lead/Recruitment	2	All	Resource allocation results will inform workforce planning strategy.
8.2.11	Develop training plan and material for HR staff and departmental staff	HR Lead	2	All	
8.2.12	Contribute to the overall TIER change management and communication plan	HR Lead	Ongoing	All	
8.2.13	Identify technology changes required to existing tools (technology needs are different for each university - refer to HR Business Cases)	HR Lead/IT support team	4	All	Assumes internal IT resources will be available to assist with technology needs assessment and requirement building
8.2.14	Develop HR technology roadmap, including Go/No-Go decision on evaluating HRIS solutions	VP HR/CIO	4	ISU	
8.2.15	Research and select HRIS vendor	VP HR/CIO	12	ISU	

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
8.2.16	Conduct requirements analysis for major technology changes, including CRM	Finance Lead/IT support team	Varies	All	Assumes internal IT resources will be available to assist with technology needs assessment and requirement building
8.2.17	Conduct technology resource planning for in-house changes or select vendor to support	HR Lead/IT support team/CIO	2	All	
8.2.18	Confirm performance measures and key performance indicators (KPIs)	HR Lead	2	All	Need to assess availability and accuracy of data to track metrics. Refer to HR-01 for sample KPIs
8.2.19	Develop Service Catalog and agree on Service Level Agreements (SLAs)	HR Lead	3	All	
8.2.20	Conduct space planning for HR service center staff	HR Lead	4	ISU	
8.2.21	Develop technology solutions	IT Team	Varies	All	
8.3	**Solution Pilot and Testing**				
8.3.1	Test future state process changes using a pilot approach across colleges and departments (Refer to Implementation 8.4 for sample tasks)	HR Lead	10	All	Depending on Pilot approach, could consider piloting services to Central Administrative units first
8.3.2	Revise approach and solution as necessary based on pilot	HR Lead	4	All	
8.4	**Implementation**				
8.4.1	Recruit and hire new staff	HR Lead/Recruitment	10	UNI + ISU	
8.4.2	Onboard new staff	HR Lead	2	UNI + ISU	
8.4.3	Conduct training for new staff	HR Lead	1	UNI + ISU	
8.4.4	Roll out updated policies and procedures to campus	HR Lead	2	All	
8.4.5	Distribute procedure manuals and customer intake guidelines	HR Lead	1	All	
8.4.6	Execute workforce transition plan	HR Lead	12	All	
8.4.7	Conduct training and knowledge transfer for retained staff	HR Lead	2	All	
8.4.8	Go-live with new technology systems	IT Team	Varies	All	
8.4.9	Conduct space transition (as needed)	HR Lead	3	ISU	
8.4.10	Establish dashboard for tracking and monitoring SLAs and KPIs	HR Lead	2	All	
8.4.11	Go-live with revamped service center	HR Lead	1	ISU	
8.5	**Monitor and Refine Solution**				
8.5.1	Provide status reports to TIER RMO during implementation	HR Lead	Ongoing	All	
8.5.2	Collect performance metrics and compile savings estimates and report to RMO	HR Lead	Ongoing	All	
8.5.3	Monitor SLAs and KPIs	HR Lead	Ongoing	All	
8.5.4	Participate in continuous process improvement sessions	HR Lead	Ongoing	All	
8.5.5	Monitor and address customer feedback	HR Lead	Ongoing	All	
9.0 Establish clear policy for Professional and Scientific staff search committee size and structure (HR-10)					
Anticipated Owner(s): VP HR					
Anticipated Start (TBD)					
9.1	**Implementation Initiation**				
9.1.1	Identify project champion and supporting team with representation from HR, Compliance, EEO, and Colleges	VP HR	1	All	Assumes Director of Recruitment will play large role in process redesign for Search Committees
9.1.2	Conduct internal project kickoff meeting with project team	VP HR	1	All	
9.1.3	Engage institutional leadership in discussion on risk tolerance and monitoring process (e.g., role of compliance and HR in recruitment process)	VP HR	2	UNI + SUI	Potential need for Board-level guidance on risk tolerance/approach
9.2	**Detailed Solution Design**				
9.2.1	Re-design search committee process based on position level (director vs. non-director) with input from HR, end users, and compliance	VP HR / Dir. Recruitment	4	All	HR-10 Business Case provides more detailed recommendations on search approach based on level of hire, as well as recommended search committee size
9.2.2	Identify and update affected policies based on planned process changes (e.g., use of search waivers)	VP HR / Dir. Recruitment	2	All	
9.2.3	Finalize Search Committee guidelines and best practice documentation	VP HR / Dir. Recruitment	2	All	
9.2.4	Document roles and responsibilities between Central HR, HR Liaisons, Compliance, Hiring managers, and search committees	VP HR / Dir. Recruitment	2	All	Changes proposed in HR-01 should be considered when realigning roles for HR-10
9.2.5	Confirm performance measures and key performance indicators (e.g., time to fill)	VP HR / Dir. Recruitment	2	All	Need to assess availability and accuracy of data to track metrics. Refer to HR-10 for sample KPIs
9.3	**Solution Pilot and Testing**				
9.3.1	Test future state process changes using a pilot approach across colleges and departments (refer to items 9.4 for sample tasks)	Dir. Recruitment	12	All	

	TIER Phase 2 Action Plan				
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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
9.3.2	Review for adherence to new search committee guidelines on backend to test new process	Compliance	4	All	
9.3.3	Revise approach and solution as necessary based on pilot	Dir. Recruitment	2	All	
9.4	**Implementation**				
9.4.1	Communicate updated policies and procedures to campus	Dir. Recruitment	1	All	
9.4.2	Distribute guidelines and recruitment best practice documentation	Dir. Recruitment	1	All	
9.4.3	Conduct training and knowledge transfer for staff supporting the search committee process	Dir. Recruitment	2	All	
9.5	**Monitor and Refine Solution**				
9.5.1	Provide status reports to TIER RMO during implementation	Dir. Recruitment	Ongoing	All	
9.5.2	Collect performance metrics and compile savings estimates and report to RMO	Dir. Recruitment	Ongoing	All	
9.5.3	Monitor Key Performance indicators	Dir. Recruitment	Ongoing	All	
9.5.4	Participate in continuous process improvement sessions	Dir. Recruitment	Ongoing	All	
9.5.5	Monitor and address customer feedback	Dir. Recruitment	Ongoing	All	
**10.0 Reduce utilities and operational costs by limiting use of buildings during the summer (FAC-03)**
Anticipated Owner(s): VP of Administration
Anticipated Start (TBD)
10.1	**Implementation Initiation**				
10.1.1	Develop implementation kickoff materials including Charter	VP of Administration	1	UNI	
10.1.2	Form a working group of affected faculty and staff	VP of Administration	1	UNI	Working group should have members from affected buildings, facilities, and other interested stakeholders as needed
10.1.3	Develop building prioritization criteria (e.g. energy usage, intensity, etc.) and prioritize buildings for in	Working Group	3	UNI	The working group should help to prioritize the buildings to start with first
10.2	**Detailed Solution Design**				
10.2.1	Finalize the buildings that will have utility usage reduced during evenings and summer	Assistant Vice President Facilities	4	UNI	
10.2.2	Create a timeline for deploying and testing the solution	Assistant Vice President Facilities	2	UNI	
10.3	**Solution Pilot and Testing**				
10.3.1	Confirm building(s) used to test solutions	Assistant Vice President Facilities	4	UNI	Building stakeholders should be consulted to determine where solutions will be tested
10.3.2	Deploy and evaluate solution(s)	Assistant Vice President Facilities	TBD	UNI	
10.3.3	Revise approach and solution as necessary based on pilot	Assistant Vice President Facilities	4	UNI	
10.4	**Implementation**				Adjustments could be made all at once or could be made using a phased approach by grouping a series of buildings together for implementation
10.4.1	Adjust thermostats in buildings	Assistant Vice President Facilities	8	UNI	
10.5	**Monitor and Refine Solution**				
10.5.1	Develop marketing and communications strategy for these initiatives	Assistant Vice President Facilities	Ongoing	UNI	
10.5.2	Provide status reports to TIER RMO during implementation	Assistant Vice President Facilities	Ongoing	UNI	
10.5.3	Collect performance metrics and compile savings estimates and report to RMO	Assistant Vice President Facilities	Ongoing	UNI	
10.5.4	Monitor and address customer feedback	Assistant Vice President Facilities	Ongoing	UNI	
**11.0 Reduce energy consumption by investing in energy management initiatives (FAC-04)**
Anticipated Owner(s): VP of Administration
Anticipated Start (TBD)
11.1	**Implementation Initiation**				
11.1.1	Develop implementation kickoff materials including Charter	VP of Administration	1	UNI + ISU	
11.1.2	Identify a team to implement energy initiatives	VP of Administration	1	UNI + ISU	The team should have representation from Facilities who are knowledgeable about energy management

	TIER Phase 2 Action Plan

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
11.1.3	Conduct internal project kickoff meeting with tiger team and other stakeholders	VP of Administration	1	UNI + ISU	This group should include the team and other members of the campus community who have an interest in the outcome
11.1.4	Develop building prioritization criteria (e.g. energy usage, intensity, etc.) and prioritize buildings for in	Tiger Team and Working Group	3	UNI + ISU	The Team Should conduct this work with input from faculty, staff, and students
11.2 Detailed Solution Design					
11.2.1	Conduct energy audits as funding exists to identify additional opportunities. Specifically audit for replacement of pneumatic controls and the systems controlled	Assistant Vice President Facilities	Ongoing	UNI + ISU	
11.2.2	Create replacement timeline and schedule based on observations from the Tiger Team and potentially energy audits	Assistant Vice President Facilities	2	UNI + ISU	
11.3 Solution Pilot and Testing					
11.3.1	Confirm building(s) used to test solutions	Assistant Vice President Facilities	4	UNI + ISU	Building stakeholders should be consulted to determine where solutions will be tested
11.3.2	Deploy and evaluate solution(s)	Assistant Vice President Facilities	TBD	UNI + ISU	Refer to 10.4 for an initial list of proposed solutions
11.4 Implementation					
11.4.1	Develop energy web page to monitor energy usage	Assistant Vice President Facilities	6	UNI + ISU	
11.4.2	Develop an inventory of leaks, failed steam traps, and create a replacement timeline	Assistant Vice President Facilities	2	UNI + ISU	
11.4.3	Replace failed steam traps	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.4	Repair compressed air network leakages	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.5	Replace pneumatic controls with direct digital controls (DDC)	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.6	Install insulation blankets in mechanical rooms	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.7	Install daylight controls / intelligence lighting	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.8	Install occupancy sensors	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.9	Evaluate laboratory equipment plug loads and replace equipment as needed	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.10	Replace chilled water coils, steam coils, hot water coils	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.11	Replace older fume hoods with energy efficient ones	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.12	Install demand control ventilation where appropriate	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.13	Calibrate sensors, actuators, valves & dampers	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.14	Retrofit HVAC units with VAV systems	Assistant Vice President Facilities	TBD	UNI + ISU	
11.4.15	Replace lighting fixtures with LED light bulbs.	Assistant Vice President Facilities	TBD	UNI + ISU	
11.5 Monitor and Refine Solution					
11.5.1	Develop marketing and communications strategy for these initiatives	Assistant Vice President Facilities	Ongoing	UNI + ISU	
11.5.2	Provide status reports to TIER RMO during implementation	Assistant Vice President Facilities	Ongoing	UNI + ISU	
11.5.3	Collect performance metrics and compile savings estimates and report to RMO	Assistant Vice President Facilities	Ongoing	UNI + ISU	
11.5.4	Monitor and address customer feedback	Assistant Vice President Facilities	Ongoing	UNI + ISU	
12.0 Create a common application portal (SS-05)					
Anticipated Owner(s): Board of Regents / Directors of Admissions					
Anticipated Start (TBD)					
12.1 Implementation Initiation					
12.1.1	Identify the project lead and supporting core working team	Project owner(s)	1	All	

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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
12.1.2	Develop implementation kickoff materials including project charter	Project lead(s)	1	All	The project charter should clearly identify key objectives, project team, key milestones and high-level
12.1.3	Finalize project schedule, confirm activity durations, and assign resources	Project lead(s)	1	All	
12.1.4	Conduct internal project kickoff meetings	Project lead(s)	1	All	Separate meetings may be required for team members and project sponsors/owners
12.2 Detailed Solution Design and Development					
12.2.1	Gather information from Admissions teams on current portals - what works well, areas of opportunity etc.	Project team	2	All	
12.2.2	Discuss required functionality of common portal with admissions teams	Project team	2	All	
12.2.3	Develop plan for market feasibility study to determine percentage of students that would benefit from a common portal	Project team	2	All	
12.2.4	Begin market study and survey student applicants on satisfaction with current portals and application patterns	Project team	4	All	
12.2.5	Determine hosting vendor / location for the common portal	Project team	4	All	
12.2.6	Document requirements for the common portal across universities	Project team	4	All	
12.2.7	Choose appropriate platform for common portal	Project team	2	All	
12.2.8	Design common portal screens / components based on requirements and needs of student applicants (ease of use, intuitive forms etc.)	Project team	4	All	Will need to take into account different needs of undergraduate, graduate and international applicants. Also need design to ensure student data is separate and sent to the correct university
12.2.9	Acquire platform (hardware and software) required to host application portal centrally	Project team	Varies	All	Depends on hosting decision made
12.2.10	Develop portal based on approved requirements	Project team	Varies	All	Typically to be done in a phased manner / recommended agile design methodology
12.2.10	Develop plan to sunset individual portals and transition to common portal	Project team	2	All	
12.2.11	Determine funding model for common portal	Board	2	All	
12.2.12	Determine support and maintenance model / plan	Project team	2	All	
12.3 Solution Pilot and Testing					
12.2.9	Conduct systems test and user acceptance test for portal before pilot testing commences	Project team	Varies	All	
12.3.1	Provide access to common application portal for select group of test users	Project team	12	All	
12.3.2	Confirm that correct student data is being sent to the appropriate university	Project team	2	All	
12.3.3	Perform full testing for each type of application - undergraduate, graduate and international	Project team	6	All	
12.4 Implementation					
12.4.1	Continue market study to confirm percentage of in-state students that cross apply	Project team	5	All	This can be done in parallel with the Board RAI study for SS-08
12.4.2	Continue to support existing application portals	Admissions IT	100	All	Can be determined based on discussions with the board after implementation
12.4.3	Deploy common portal at hosting facility	Project team	2	All	
12.4.4	Integrate common portal with existing systems (student information systems)	Project team / Central	6	All	
12.4.5	Institute funding model for common portal	Project lead(s)	1	All	
12.4.6	Perform review of performance and user utilization of common portal - prior to decommissioning decision	Project lead(s)	2	All	
12.4.7	Retire individual application portals	Project team / Central ITS	100	All	
12.5 Monitor and Refine Solution					
12.5.1	Provide status reports to TIER RMO during implementation	Project lead(s)	Ongoing	All	
12.5.2	Monitor relevant site metrics for portal in terms of number of applications completed, number of applications unfinished, number of support issues	Project lead(s)	Ongoing	All	
12.5.3	Gather student satisfaction data on portal through surveys	Project lead(s)	Ongoing	All	
12.5.4	Make necessary modifications to the common portal due to student feedback or to support new college / department requirements	Project team	Varies	All	
13.0 Standardize "manual" calculation of Regent Admission Index (SS-08)					
Anticipated Owner(s): VP of Administration					
Anticipated Start (TBD)					
13.1 Implementation Initiation					
13.1.1	Identify the project lead and supporting core working team	Project owner(s)	1	All	Assumed that a RAI Task Force will be formed - comprised of members from the different universities and the Board.
13.1.2	Develop implementation kickoff materials including project charter	Project lead(s)	1	All	The project charter should clearly identify key objectives, project team, key milestones and high-level plan, and should leverage the business case documents as a key source

	TIER Phase 2 Action Plan			
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ID	Step / Activity Description	Task / Activity Owner	Potential Duration (Weeks)	Universities	Notes
13.1.3	Determine RAI Task Force participants	Project owner(s)	1	All	Suggest the task force include enrollment leads from each of the universities
13.1.4	Finalize project schedule, confirm activity durations, and assign resources	Project lead(s)	1	All	
13.1.5	Conduct internal project kickoff meetings	Project lead(s)	1	All	Separate meetings may be required for team members and project sponsors/owners
13.2 Detailed Solution Design					
13.2.1	Assemble RAI Task Force and get organized for project work / discussions	Board RAI task force	2	All	
13.2.2	Gather details on the alternative RAI calculation from each university	Board RAI task force	2	All	
13.2.3	Gather prospective student application and attending student data from the universities	Board RAI task force	4	All	For use with the RAI regression analysis
13.2.4	Review the current RAI calculations and propose factors / weights for alternative RAI calculations	Board RAI task force	12	All	BOR to perform a study similar to the 6 month study performed in 2006 to develop the original RAI calculation.
13.2.5	Augment or develop the necessary maintenance process for each universities' current alternative RAI calculations (for interim time period)	Board RAI task force	2	All	For instance, updated RAI maintenance processes should leverage the central data mart to analyze success indicators against current RAI parameters
13.2.6	Gather details on data analytics platforms in use at the universities	Project team	1	All	
13.2.7	Draft requirements for the central data mart for cross-university data	Project team	1	All	
13.2.8	Design and populate data mart with student application data from the universities	Project team	3	All	Assumes data mart will be installed in a central data center facility where BOR has access
13.2.9	Leverage currently available student data to determine coefficients or weights for alternative RAI calculations	Project team	12	All	Conduct detailed regression analysis to determine appropriate coefficients; Support activity to 13.2.4
13.2.10	Draft communications plan to explain the new RAI calculation and data mart	Project team	2	All	
13.3 Solution Pilot and Testing					
13.3.1	Test the proposed new RAI calculation using historical data	Board RAI task force	5	All	
13.3.2	Test the proposed new RAI calculation alongside the current alternative RAI calculations used at the universities	Board RAI task force			
13.3.3	Perform test runs of the modified alternative RAI calculations	Project team	5	All	
13.3.4	Run test queries and analyses on the newly installed data mart to determine coefficients for current alternative RAI calculations	Project team	5	All	
13.4 Implementation					
13.4.1	Publish the new RAI calculation to the public and allow for comment	Board RAI task force	20	All	
13.4.2	Follow communications plan to introduce the new RAI calculation	Project lead(s)	Varies	All	Assuming that the new RAI calculation may not be used in admission decisions for sometime to allow the public to understand the changes
13.4.3	Integrate the new RAI calculation into the SIS systems for improved automation	Central ITS	8	All	
13.4.4	Institute a proper maintenance process for the current RAI calculation and follow as necessary to update coefficients	Admissions IT	2	All	
13.5 Monitor and Refine Solution					
13.5.1	Provide status reports to TIER RMO during implementation	Project lead(s)	Ongoing	All	
13.5.2	Adjust current alternative RAI calculation until new RAI is in place	Admissions	Varies	All	
13.5.3	Maintain data mart and update with current student data as necessary	Board	Ongoing	All	