Administrative Excellence
UNIVERSITY OF WISCONSIN–MADISON
Shaping our Future

Phase III Work Team Project Charter
Email and Calendar Consolidation Implementation

Charter approved August 24, 2012

Team Name	Email and Calendar Consolidation Implementation Team
Objective	Team objectives are to plan and execute the implementation of a campus-wide UW-Madison email and calendaring solution (Microsoft Office 365), as recommended by the Phase II Administrative Excellence (AE) work team, vetted by the Advisory Committee and approved by the Steering Committee.
Goals	The primary goal of the team is to successfully convert UW-Madison campus users from their current email and calendaring platform to the MS Office 365 email and calendaring product, including technical implementation, transition of data, user training, development and communication of support resources, and hand off to the DoIT support organization: • Rollout Group #1 – early adopters (Summer/Fall 2013) • 80% majority of campus users (Late 2013/Early 2014) • 100% of users identified for conversion (Aug 2014)
Scope	<u>In scope</u>: • Implementation of Microsoft Office 365 Exchange Online <u>Out of scope</u>: • Implementation of software in the MS Office 365 suite unrelated to email & calendaring is considered out of scope, though significant work may be performed concurrently. o Microsoft Office 365 SharePoint Online o Microsoft Office 365 Lync Online for Enterprises o Microsoft Office 365 Office Professional Plus • Though the development of a campus-wide active directory is critical to the success of the Email and Calendaring Implementation Team, a separate companion project team is charged with creating the directory. <u>Related projects & initiatives</u>: • Directory Services/Authentication (Campus-wide Active Directory) • AE Enterprise IT Decision-Making: Future State • AE Policy Work Group
Critical Assumptions	• The established Administrative Excellence issue resolution processes will be used to resolve issues as they arise in a timely fashion. • Most team members will be able to dedicate at least 10 hours per week during the Analysis/Planning and Design (Technical Planning) stages of the project, and dedicate additional hours during the Implementation and Conversion stages (to be determined, but estimated to be at least 20

	hours per week). • The team leader will be able to dedicate at least 16 hours per week during the Analysis/Planning and Design (Technical Planning) stages of the project, and dedicate additional hours during the Implementation and Conversion stages (to be determined, but estimated to be at least 24 hours per week).
Critical Risks	• The implementation of campus-wide active directory is critical to the success of the Email & Calendaring Implementation. Issue or delays in the Directory Services/Authentication project will have a direct impact on the timeline and success of this project. • Selection of a Professional Services Implementation Partner is critical to the success of the Email & Calendaring Implementation. Issues or delays in the RFP and contracting process will have a direct impact on the timeline and success of this project. • Coordination with Academic, Fiscal and Calendar year activities. The timing of conversions will be directly affected by organizational impacts of conversions at specific times during the year. • If distributed IT organizations do not respond promptly to data requests, project timeline may be at risk; if this risk occurs, the team will utilize the established AE issue escalation process.
Timeline / Milestones	• Change management & campus communication activities will be planned, managed, and executed throughout the project lifecycle. • Timeline & milestones will be revisited and shared with the Email & Calendaring Executive Committee once the team completes a work breakdown structure exercise. **Pre-Work (July 2012):** Project structured, project leadership and team membership identified and assigned, charter drafted, project management infrastructure in place, kickoff meeting scheduled. **Contracting (July – Dec 2012):** Create RFP for professional services and solicit proposals; all licensing agreements, professional services contracts and associated documents completed and signed. **Analysis / Project Planning (July 2012 – Dec 2012):** Conduct MS Office 365 Solutions Architectural Workshop (SAW) and complete the SAW questionnaire; participate in deployment migration due diligence (MDD) sessions and create the MDD report. **Design & Technical Planning (Fall 2012 – Spring 2013)** **MS Office 365 Installation and Configuration (Dec 2012 – Summer 2013)** **Campus Conversions (Summer 2013 – Aug 2014):** convert campus user groups from their current email and calendaring platform to the appropriate MS Office 365 email and calendaring product(s); this includes technical implementation, transition of data, user training, development and communication of support resources, and hand off of support responsibilities to

	the DoIT organization. **Project Close (Fall 2014)**
Team Members	**Email & Calendaring Executive Committee:** Bruce Maas (CIO) John Krogman (DoIT Chief Operating Officer) Alice Gustafson (AE) Rhonda Davis (SVM) **Business Process Owners:** Chris Holsman (DoIT) Brandon Bernier (DoIT) **Project Managers**: Lynnette Gerstner (DoIT) Dan Koetke (AE) **Solution Team Leader:** Bobby Burrow (AIMS) **Microsoft Solution Architect**: Steve DeVoti (DoIT) **Delivery Architect:** Jim Helwig (DoIT) **Business Analyst**: Carl Vieth (Engineering Prof Dev) **Technical Advisory Group:** Charlene Krembs (CALS) Rob Kohlhepp (Engineering) Rick Konopacki (SMPH) Beth Wiebusch (SoB) Jim Roberts (Athletics) Peg Eusch (Library) Nancy McDermott (SSCC) **Technical Team Leaders:** Patrick Brennan (tbd) Microsoft Implementation Expert **Technical Architect:** Jesse Thompson (DoIT) **Technical Team Members:** Eric Straavaldsen (L&S- Administration) Craig Dunigan (DoIT) Kelly Bauman (AIMS) Tim Czerwonka (L&S– Comp Sci) (tbd) – SMPH **Purchasing Negotiation Sub-Team Members:** John Krogman (DoIT) Chris Holsman (DoIT) Lori Voss (Business Services – Purchasing) Kolleen Apelgren (DoIT) Carl Hubbard (Business Services – Purchasing) **Services RFP Sub-Team Members:** Kolleen Apelgren (DoIT) Carl Hubbard (Business Services – Purchasing) Eric Straavaldsen (L&S- Administration) Kevin Cherek (AIMS) Chris Holsman (DoIT) Pat Brennan (DoIT)

	Steve DeVoti (DoIT) (tbd) Independent	
Project Members	**Member Name**	**Member Role**
	Team Member	While the specific role of Team Members will vary according to skill set and specific area of expertise, Team Members are also expected to contribute to the development and execution of the project implementation plan and to assist in stakeholder engagement and communication activities.
	Business Analyst	The Business Analyst is responsible for identifying the needs of the business and the users for the purpose of solving business problems. The business analyst works as a liaison among stakeholders to elicit, analyze, communicate, and validate requirements for changes to business processes and systems.
	Technical Architect	The Technical Architect is responsible for architecting and designing email and calendaring solution. The emphasis is on implementation of a stable and supportable email and calendaring system.
	Technical Team Leader	Partner with the Solution Team Leader to provide technical leadership. This role is responsible for conducting, leading and coordinating the day to day development activities throughout the project.
	Solution Architect	The Solution Architect is responsible for architecting and designing all elements of the email and calendaring solution, including the implementation process and tools. The emphasis is on a solution that meets our current requirements as well positions us to take advantage of future functionality.
	Solution Team Leader	Partner with the Technical Team Leader and the Project Managers to develop agendas and facilitate team meetings; identify task owners and assign relevant task responsibilities and monitor the progress of the project. This role is focused on the successful execution of the project objectives.
	Administrative Excellence Project Manager	Partner with the DoIT Project Manager to provide comprehensive project management services; this role places

		emphasis on change management activities such as stakeholder engagement, communication plan, and positioning this project within the context of the overall AE initiative.
	DoIT Project Manager	Partner with the AE Project Manager to provide comprehensive project management services; this role places emphasis on managing the project on a day-to-day basis to ensure that the project teams delivers email and calendaring products and services to campus to the required standard of quality and within the specified constraints of time and cost.
	Business Process Owners	Support the team through the allocation of resources, removal of roadblocks, participation in change management and communication activities, and ensuring the project benefits are sustained through policy and process leadership.
	Executive Committee – Email & Calendaring	Oversee the progress of the Implementation Team; manage, administer, and fund the work of the team; ultimately responsible for the overall success of the project.
	Advisory Committee	Receive periodic progress updates from the team, and provides feedback.
	Steering Committee	Provided final decision to approve the implementation of the MS Office 365 email & calendaring solution; maintains all final decision-making authority; will continue to support implementation through participation in change management / communication activities as appropriate.