UW-Madison
Administrative Excellence – Shaping Our Future
Phase II Work Team Project Charter
Email and Calendar Consolidation

January 06, 2012 v5.2 dgk
Approved by Steering Committee November 23, 2011 (v3)
Reviewed by Advisory Committee December 1, 2011 (v3)

Team Name	Information Technology - Email and Calendar Consolidation
Objective	The objective of this project, as prioritized by the Advisory Committee and approved by the Steering Committee, is to build out the email and calendaring consolidation proposed as an opportunity within Phase I of Administrative Excellence. This will include incorporating salient portions of the work completed within the campus project launched in May of 2010. Team members will help to review existing requirements results, vendor evaluations, and collect data in support of the creation of an actionable business case for a campus-wide UW-Madison email and calendaring platform, a cost model for the solution, and a proposed mechanism for funding the solution. This recommendation will be developed, reviewed, and ultimately approved through the oversight and governance structures of the University's Administrative Excellence (AE) initiative.
Goal	Identify a single email and calendaring platform for the UW-Madison community (including faculty, staff, and students) that meets the broad needs of the University. Identify the system, quantify the investment required and efficiencies anticipated, and determine service levels and policies that would govern the administration and use of the new system.
Scope	The primary scope of this project is to build on the existing work that has been completed across the University and provide a mechanism through which an enterprise-optimal solution is reached. It is anticipated that this will be done through: • a comprehensive review of existing efforts conducted under the "Email, Calendar and Chat Project" including the requirements gathered, constituents considered, vendors reviewed, interim recommendations developed, knowledge developed to date, and any roadblocks identified • the collection of comprehensive and enterprise-wide data on the current provision of email across UW-Madison • the creation of a business case to support implementation of the proposed solution(s) The scope of the analysis will include a review of the interoperability of reviewed systems with "front-end" email and calendaring software and a review of the impact of the email and calendaring platforms on their interoperability with and/or impact on enterprise knowledge management, change management, project management, and collaboration software packages. While these components will not be primary drivers of a decision, they will be included in the review and recommendation process.
Critical Assumptions	• The existing project, which has been active for over 14 months has

	collected a comprehensive set of requirements from across the UW-Madison enterprise • The existing project has reviewed the viable technology platforms for email and calendaring • The distributed IT organizations will promptly respond to data requests made by this working team • The established Administrative Excellence issue resolution processes will be able to resolve issues as they arise in a timely fashion • Team members will be able to dedicate at least one day (8 hours) per week for a concentrated period of approximately 6 to 8 weeks, and then additional time thereafter (to be determined as required but estimated to be 2 to 4 hours per week for 10 to 12 weeks) • The team leader will be able to dedicate at least 10 hours per week for a concentrated period of approximately 6 to 8 weeks, and then additional time thereafter (to be determined as required but estimated to be 4 to 6 hours per week for 10 to 12 weeks)
Timeline	18 weeks encompassing the following activities: • **Pre-Work** – Additional data collection: gather information from the Email, Calendaring and Chat Project, review requirements defined and results from RFI, review available data from DoIT regarding email systems • **Weeks 1 to 2** – Hold first team meeting to discuss principles, scope and goals, roles and responsibilities of members. Identify data needed for Business Case Document, review and learn from work conducted to date, prepare fit-gap between current work and Administrative Excellence opportunity • **Weeks 3 to 4** – Define additional data required, draft IT data definitions for each data element to support a data collection process, review pilot programs and outcomes from field tests, • **Weeks 5 to 6 – A**ssign roles for business case development, and provide guidance to AE and Huron on implementation strategies and necessary or desired policies; finalize data definitions and data request document to be distributed to the Advisory Committee and IT community including broader communication regarding the purpose of the request and the link to other IT activities; distribute data request document • **Weeks 7 to 8** – Discuss business case content, identify gaps in analysis, and assign additional responsibilities for drafting business case and implementation plan; conduct interviews with email and chat users as required; review requirements and draft a fit-gap for student versus staff email. • **Weeks 9 to 10** – Complete student and staff fit-gap analysis; present student and staff email and calendaring fit-gap analysis to Advisory Committee; continue to complete elements of business case document. • **Week 11** – Receive and analyze data from data collection process; continue to work on business case, discuss business case content, identify gaps in analysis, and assign additional responsibilities for drafting business case and implementation plan; conduct additional analysis as required. • **Week 12** – Incorporate data into business case and draft the final business case document • **Week 13** – Present recommendation(s) and final business case to the

	Advisory Committee for recommendation to the Steering Committee. • **Week 14** – Adjust business case/plan based on Advisory Committee feedback • **Week 15** – Present business case/plan to Steering Committee • **Week 16** – Debrief Steering Committee meeting and to determine next steps, if any • **Weeks 16 to 17** – Refine communication plan, stakeholder engagement and step-by-step implementation plans, and policy language • **Week 18** – Present all material to Steering Committee for go/no-go decision
Deliverables	Project Deliverables • Report providing a summary fit-gap analysis of current work completed and AE project goals and scope • Communication Plan coordinated with AE project staff • Report providing a fit-gap analysis of student email and calendaring requirements versus faculty and staff email and calendaring requirements • Data request document to be distributed to the IT community across campus including clear data definitions, description of purpose and goals, and specifics regarding all email and calendaring services offered across the UW-Madison enterprise including a documentation (or informed estimate) of the costs of service delivery • Interim project presentation to the Advisory Committee • Completed Business Case in the appropriate template • Draft policy document outlining policies for email and calendaring services • Input into policy development and communication activities conducted through the Administrative Excellence project • Report on Data Project Management Deliverables • Weekly status updates in the appropriate template • Completion of issue tracking Additional interim deliverables may be required as the working team identifies additional needs for Advisory Committee and/or Steering Committee review during the course of the workstream.
Team Members	Team Leader - Rhonda Davis (SVM) Team Member - Roger Hanson (DoIT) Team Member - Bobby Burrow (AIMS) Team Member - Eric Straavaldsen (L&S) Team Member – Louise Root-Robbins (International Studies) Team Member - Lisa Walters (VCA) Team Member - Carl Vieth (EPD) Team Member - Jon McKenzie (L&S) Team Member – William Easton Subject Matter Expert – Chris Holsman (DoIT) Project Support – Chris Slatter (Huron Consulting Group)

Project Members	**Member Name**	**Member Role**
	Team Member	Provide feedback for data collection and analysis activities; assist in data

		gathering; contribute to development of proposed solutions, business case and implementation plan; assist in communication effort and stakeholder engagement.
	Team Leader	In addition to the responsibilities of a working team member, the team leader will be responsible for partnering with Huron and AE to develop agendas and facilitate team meetings; identify task owners and assign relevant tasks and responsibilities to the group; support deliverable creation.
	Administrative Excellence Project Staff	Provide overall project management and guidance through the development of agendas, tracking of team progress, and escalating issues as needed; build the communication plan, stakeholder engagement, and step-by-step implementation plans and policy language; support business case development process and presentation of deliverables to Advisory Committee and Steering Committee.
	Business Process Owners	Support data collection activities; vet proposed solutions, business cases, policy language, and initiative communication, stakeholder engagement, and step-by-step implementation plans.
	Huron Consulting Group	Contribute to data collection process and perform necessary data analysis; provide project management and guidance through the development of agendas, tracking of team progress, and escalating issues as needed; partner with AE project staff to build communication, stakeholder engagement, and step-by-step implementation plans and policy language; support business case development process and presentation of deliverables to Advisory Committee and Steering Committee.
	Advisory Committee	Review initial drafts of business case and implementation plan and provide feedback.
	Steering Committee	Review business case and implementation plan and provide feedback; provide final decision to implement.