



OE RESOURCE REQUEST APPLICATION

University of California, Berkeley

I. SPONSORSHIP

A. Initiative

Initiative	OE-IT		
Initiative Manager	Lyle Nevels		
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B. Sponsorship

Sponsor Name	William Allison		
Sponsor Signature		Date	
Sponsor Name	Shelton Waggener		
Sponsor Signature		Date	
OE Program Office Signature		Date	

C. Give the title of the resource

**Productivity Services Suite
Software as a Service – Hosted and Local**

(A supplement to the OE-IT End User Support and Provisioning Proposals)

II. PROBLEM STATEMENT/CASE FOR CHANGE

A. Identify and describe what needs the proposed solution is seeking to address.

Today, UC Berkeley spends an inordinate amount of time and money thinking about commodity IT services used by faculty, students and staff. Like electricity and plumbing, the services of email, calendaring, office productivity software (word processor, presentation and spreadsheet programs), and collaboration tools (SharePoint, bSpace, Google Groups) are mission-critical. In

many cases, students, staff and faculty have adopted cloud or outsourced collaborative tools on an ad-hoc basis due to the lack of feature and function capabilities of current standard campus solutions.

These IT services represent solved, standardized, even ubiquitous technology problems that are neither core nor unique to the University's mission. Yet, perplexingly, we treat these commodity services with a disproportionately high interest and use elite staff to manage them. The campus stands to benefit enormously by using the collaboration technologies such as email and online productivity tools to better manage the sharing of information and business processes electronically. Evolving our way of thinking about collaboration by implementing a campus productivity platform proposed here will enable future savings areas such as reducing printing and making more effective in-meeting collaboration technologies.

A synopsis of each service follows:

EMAIL:

Background

UC Berkeley receives over 1 million emails every day, and to paraphrase one staff member, despite pronouncements in the mainstream media about the "death of email", we just do not see that death or any sign of it in the usage statistics. Today the email system runs on open source software and about 30 commodity Linux servers, offers users a 10GB quota, is relatively spam and phishing free, is a free service for campus users, and represents a monumental accomplishment by the past and present members of the tiny managing team.

A few years ago, email ranked as one of Berkeley's #1 IT problems; today users are satisfied with the overall service, and there have been very few outages or service impacts of any kind. The costs are among the lowest among comparable higher academic institutions. Today, one of IST's most senior technology experts, who is almost on the level of a national figure in the open source community, keeps the service running with what approaches multiple 9's of uptime (that's very good!). In order to run the service this well and this cheaply requires elite talent, and a very lean team. Today there is only one other person, in a different IST department, who understands the technology and management of the email service well enough to help in an emergency.

Current Issues

- Today, staffing has been cut to the breaking point, i.e., there is little to no redundancy, and the campus is at serious risk of catastrophic failure of mail should anything befall these two people.
- As a standalone service our current email works well, but today the trend is to holistically treat mail, calendar, office productivity software, and collaboration tools. As such, the continued siloed management of these individual services is not a good long-term position.
- Email is not fully funded. The deficit has continued to be covered annually through temporary funds.

CALENDAR:

Background

UC Berkeley CalAgenda serves much of the University staff, with full penetration in the large administrative divisions and less so among academic units. Currently the service provides users with the ability to schedule multi-person meetings while screening for time/location conflicts, and supporting functions like group and building management. Today, the campus uses a separate, homegrown system for campus events management.

Current Issues

- UC Berkeley's CalAgenda service currently uses a discontinued commercial product from Oracle, for which the University does not have a support contract. The product is not provided patches for improvement, maintenance, or security fixes.
- CalAgenda is incompatible with the current versions of Microsoft Outlook, which is popular with administrative and business users on campus, and CalAgenda requires expensive add-ons in order to properly synchronize users' calendars with mobile devices.
- The same small technical team responsible for CalMail also supports CalAgenda.
- The current funding model for CalAgenda relies on a small but noticeable per-user annual recharge fee, which has proven a powerful disincentive to adoption by a large part of the campus community.
- Students currently do not have a calendaring tool, although they have called out the need for one that integrates well with other campus resources.

OFFICE PRODUCTIVITY SOFTWARE AND COLLABORATION TOOLS:

Background

Today, members of the UC Berkeley community select, and (when using commercial products like Adobe and Microsoft Office) pay for office productivity software on an individual, unit, department or divisional basis. Staff, faculty and students all tend to follow different paths. Some choose no cost open source products like Libre office or OpenOffice, some chose Office.com or Google Docs, some choose the Microsoft Consolidated Campus Agreement to purchase varying levels of products and services, and still others choose to personally obtained copies of the software from retail vendors (e.g. Staples). The current estimate is that campus annually spends about \$400K on Microsoft software via standard campus procurement channels. There is no estimate for other spending on independent purchases such as those made by students or faculty (who are usually reimbursed by their department) on their own.

Similar challenges exist on products used for content creation and distribution where Adobe is the current dominant vendor. Estimates are that we currently spend through departmental and individual purchases in excess of \$400k a year for these products.

This proposal approaches the issue from the "bottom up" -- clearly advocating for personal productivity up through the enterprise. However, with the appropriate governance and strategies in place, the same solutions can be applied in a "top-down" approach.

At the enterprise level, the domains of (a) business process management (including process-based workflows); (b) content management (including imaging); and (c) records management (data retention, destruction and archiving) are now presented as integrated operating environments which often use the same technology platforms to provide efficiencies, productivity and policy compliance across the enterprise.

A good example of this is with MS SharePoint, a web based collaboration tool that allows for a group to share files, wikis, calendars and other communications. Groups and individuals are using MS SharePoint as collaboration utility for basic document management and sharing, managing projects, etc. Other groups on campus have leveraged the same platform to develop applications and workflows based on e-forms and documents, often using data elements being used with other systems. A number of other products use by campus also perform this function.

This top-down approach is being addressed in another OE proposal, "Business Process Management, Enterprise Content Management and Records Management." Both proposals should recognize this overlap with goals and investments.

The landscape is changing rapidly in the office productivity software space, and what used to be clear distinctions between

product/service lines are blurring. For example, what used to be thought of as collaborative tools or Intranet platforms such as Microsoft SharePoint or Google Groups are now offered in web-based “lite” versions free for individuals. Today the lines between the collaborative platforms and end user authoring tools like Microsoft Office and Google Docs are also blurring as all functionality is beginning to be delivered via the web. Mobile devices further complicate the picture, with more and more people using non-standard computers for authoring. Apple sells word-processing software in native iPad formats, and vendors, including Microsoft, offer both mobile versions and native application flavors of Microsoft-compatible authoring tools. The UC Report – [Email Workgroup Report, Version 1.0, May 25, 2010, page 11 -] included an excellent graphic depicting the convergence of productivity technologies, which include email, calendar and the office productivity software:

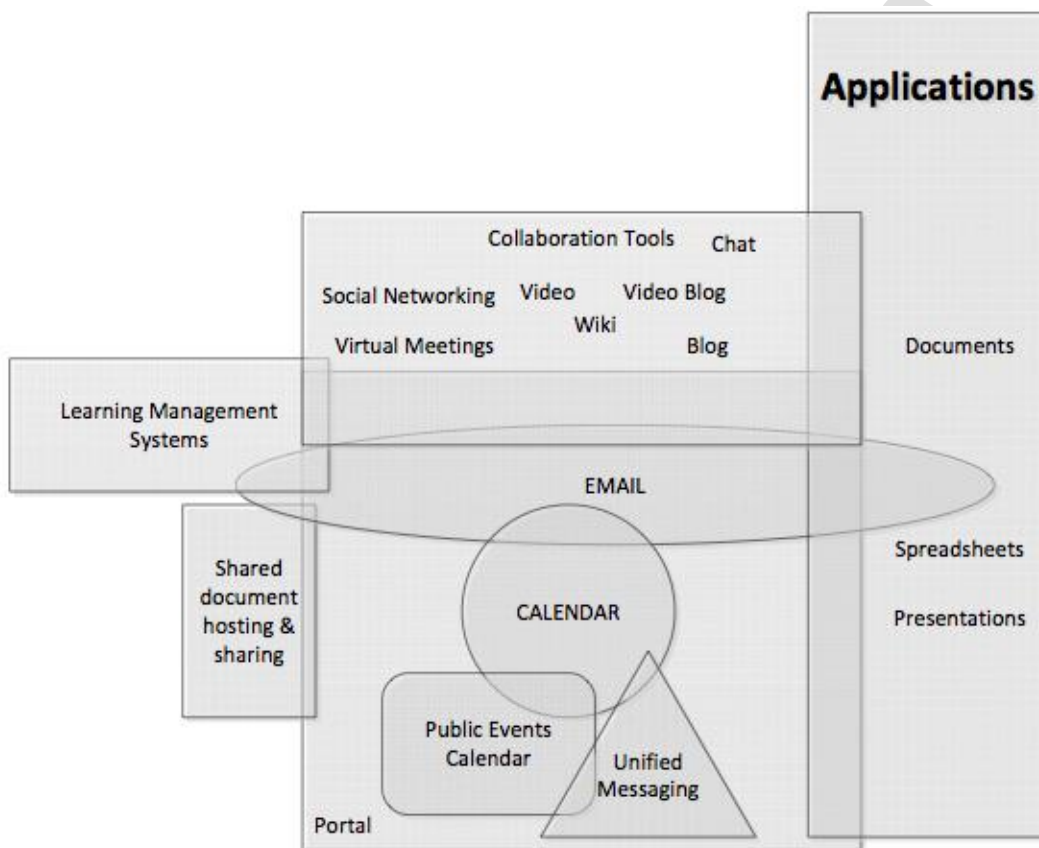


Figure 1 – A Complex and Expanding Collaboration Environment

As the chart above shows, in the very near future other tools will share the central role currently held by email.

Current Issues

- Many staff-hours are spent each year in meetings to determine which software to buy, and what level of site license or purchasing and product options to buy.
- The choices are numerous and often complex. In many cases, staff ends up with the wrong tool for the job because their department did not buy the full set of tools needed for their work.
- Students, staff and faculty cannot use online offerings from Microsoft and Google for UC business due to the lack of established campus agreements and policy around the terms under which these tools can be used.
- Students, staff and faculty do use commercial online tools for personal use and find that often each one uses a different

identity management approach, which often diverges from the standard campus identity management systems - leading to multiple logins, redundant credentials and inefficiencies.

- The use of office productivity software and the need for online sharing of the products of this use – documents, spreadsheets, and presentations – has led to recharge services such as IST’s CalShare [SharePoint] service. CalShare, however, is used mostly within administrative departments, due to the financial disincentives of adopting it by students and faculty.
- To provide industry standard storage quotas for services like CalShare and similar collaborative tools, which are essential to the use of word processing and spreadsheet sharing and collaboration – is cost-prohibitive, potentially running into the millions of dollars per year at the enterprise level.
- With respect to SharePoint, the relatively modest charge has also proven to be a barrier to adoption.
- The lack of *common* office productivity software and collaboration tools has led to significant fragmentation of *chosen* tools (all of which are commodities). And in a contradictory way, this fragmentation raises the barriers to an effective workplace as well as to knowledge sharing in an institution whose purpose is to share knowledge.
- Today as a campus we treat email, calendar, office productivity software, and collaboration tools as separate efforts and problems. However, in today’s interconnected world, users see these tools as increasingly interconnected. Managing vendor strategy for the sourcing, acquisition, and distribution of this “suite” of tools should be done holistically to get the best terms for UC Berkeley and to get the most effective use for the campus community.

B. Describe the solution that is being proposed to meet the identified need(s).

The costs of keeping pace with innovation and expansion of the collaborative tools space is something that UC Berkeley cannot afford. For example, the value of a typical free outsourced storage quota alone is approximately \$1M-\$2M per year in cost avoidance. For most of the faculty, students and staff at UC Berkeley, the email, calendar, office productivity software, and collaboration tools required for an effective University are commodities. Procurement of solutions for these commodities at the local level is neither necessary nor efficient. We propose a campus solution that aligns with the broader University of California system-wide strategy, and with higher education nationally (through alignment with initiatives such as those being developed through industry groups like the Common Solutions Group). These all seek to outsource the provisioning, management and operation of a whole suite of productivity solutions from a single vendor, to be chosen from one of the two leading industry providers of these services - Google or Microsoft. We recommend a three -five year project commitment with evaluation and transitions reassessed every five years.

We recommend leveraging work of the ITLC-sponsored UC RFP or agreement to procure a coordinated UC Berkeley program for email, calendar, office productivity software and collaboration tools (including but not limited to online and locally installed software and services from Google, Adobe and Microsoft).

With the diversity and complexity of the UC Berkeley community it is likely that some sections of the community will have needs differentiated from those offered by the common platform. The implementation team must identify the boundaries of what functions are served by the common platforms, and which functions require alternatives for subpopulations including specialized feature-sets, regulatory compliance, and extreme security policies, and lead efforts on how to fund the differentiation layer (probably through cost recovery).

Over the past few years there have been many coordinated discussions about this topic, with 2010 seeing several groups thinking through and writing up solutions for individual campuses and for the UC System as a whole. Additional meetings and conversations continue at the department and team levels. We all knew then there were better solutions, but even as groups met to discuss the needs and the options, the technology was swiftly evolving, and now the choices have become much clearer.

What is commercially available today gives the campus an opportunity to become connected in ways we cannot sustainably develop for ourselves. Looking at a two-year trajectory, these productivity and collaboration tools are develop on a steep curve, rapidly growing with a progression of innovation and improvements compared with the linear improvements we might be able to deliver on a campus basis. Having email, calendar, tasks, and document retention transparent and at a lower unit cost is a good start. Being a better-connected community will give the Berkeley campus additional benefits that we will not fully realize until we use them, especially as mobile devices become more ubiquitous. By better connecting us internally and to the world-at-large, and delivering continual efficiency gains and cost reductions, the focus can be on the use of these tools and their expanding capabilities, rather than on how to sustain playing catch-up, at best a Sisyphean task. This project will lower costs of email, calendar and productivity and collaboration tools as a whole. At the same time, campus must invest some resources in providing change agents, trainers, and coaches on campus who can help develop and promote better usage models of tools such as SharePoint or GoogleDocs in order to provide acceptable levels of campus-facing outreach, training and support.

We tend to look at the productivity suite of tools as individual performance enhancements – and they are. However, there is an even great benefit in having a more connected campus where faculty, students and staff can interact in groups, teams, committees, both among ourselves on campus and with others in our fields and with interests in common across the U.S. and internationally.

Productivity Suite – Now and Proposed

TOOL/FEATURE	NOW	PROPOSED
EMAIL (CalMail, not a recharge service, available to all)	Works well, better security, efficient system. But both short- and long-term support challenges.	Works well, cheaper storage costs, and better integration with other tools, e.g., calendars and address books.
CALENDAR (CalAgenda, a recharge service available only to staff and faculty)	Obsolete, expensive, not vendor supported, not integrated with other tools or other calendars, and has limited campus use.	Integrated with other tools, e.g., address books and email, and other iCal-standard calendars, becomes a Common Good service available to all on campus.
SharePoint	Per site fee for SharePoint is expensive (campus cost over \$1M).	Included and integrated with other productivity and collaboration tools
Address Books	Each feature has its own without interoperability	Integrated across tools with most features
New platform integration	Separate development for each	Vendor managed and supplied
Mobile platform support	Must be built and maintained	Included
Security of Data	Managed locally, greater perceived control.	Must be managed through contractual arrangements and process governance.

	Productivity (word processor, spreadsheet, presentation)	Separate procurement, inconsistent ownership and costing. Unknown cost to campus, but in excess of \$850k annually.	Included in the software as a service - hosted solution with desktop/cloud version interoperability. Allows for greater mobile platform usage.
	PDF	Individual and department wide purchases for various products in this area, done with no	Could be done as a bundle or software as service offering for whole campus.

C. Describe the alternate approaches you evaluated in the process of developing this proposal and why those alternatives were not selected.

The OE IT team examined the possibility of running email and calendar locally, in our own data center and stepped back from this option due to the need for significant engagement of elite staff that is needed in other areas that directly serve the University Mission. In addition, staffing levels for core mail and calendar services are insufficient for the growth of the service.

Running email and calendar services individually makes it difficult to provide users with the tools and capabilities that commercial vendors like Microsoft and Google can offer that blend and blur the distinctions between email, calendar, authoring and collaboration technologies (see Figure 1). In addition, while most of the free or low-cost commercial offerings include significant storage quotas that have been trending upward in capacity, storage must be provided locally for services we run, and though the trend-line is decreasing on storage costs at the University, they are still much higher than commercial offerings.

We also considered the possibility of providing campus with a choice of vendor by offering both Google and Microsoft services but this presented increased technical complexity as well as user experience problems. For example, if part of the population used Google calendar, and the other part used Microsoft, the University would either have to require everyone to use both in order to properly plan meetings, or would have to write custom software to manage redundant systems. In addition, our service center staff and end user technical support staffs would need to be expert in multiple offerings, which would incur additional expenses for training in both.

III. IMPACT AND STRATEGIC ALIGNMENT

A. Describe how the proposed solution aligns with the OE goals:

- Reduce administrative costs and enable the campus to direct more resources to teaching and research
- Advance an effective and efficient operating environment
- Instill a culture of continuous improvement that leads to high quality performance and outcomes

- The solution will eliminate thousands of person-hours in meetings currently used as people decide on productivity tools each year.
- The solution integrates what are now run as separate services, leading to greater ease of use and functionality for the campus community and greater efficiency (both time and money) for those that maintain the systems.
- The solution provides the campus community with the ability to use the current and future devices of their choice, e.g.,

desktop, laptop, mobile, and to operate in a collaborative environment as commercial technology unfolds without the cost of internal development by IST staff.

B. Identify any other anticipated benefits in implementing the proposed solution.

- The solution provides ongoing innovation managed through vendors, and all products being considered offer state-of-the-art web and mobile interfaces, eliminating the need for currently used per user charged sync services, which keeps many from using their mobile devices.
- The solution will remove a significant institutional liability, and also position UC Berkeley in alignment with potential UC system wide efforts to utilize current and near future innovation in communication technologies.
- For the first time faculty, staff, and students will all use the same tools to participate in campus *life*.

C. Identify the risks of not implementing the solution.

- The email and calendar systems may fail and require additional staff that we do not have and must bring in at significant expense.
- Mail and calendar may suffer a significant outage, leading to loss of productivity on campus.
- The desire for integrated solutions has already created fragmentation across campus. Not addressing this desire will only increase this fragmentation.
- Other OE initiative efforts require a campus-wide calendaring system, which the current one cannot provide.
- Oracle will not continue support of the current calendaring system, which current users find problematic and others do not want to adopt and pay for.
- The aggregate costs of providing individually procured or developed “best of breed” solutions for email, calendar and productivity and collaboration tools will continue to grow compared with the rapid evolution of vendor products, and the inevitable feature function catch-up game will lead to a combination of much higher costs along with declining levels of product acceptability.

D. Describe the constituency that is intended to benefit from the proposed solution (e.g., students, faculty, staff, 1-many units)

The proposal benefits the entire campus community – students, staff and faculty.

E. Describe the extent to which this proposed solution is a collaborative effort either within campus or with external partners.

It is envisioned that this effort will align with ITLC 10-campus efforts, with industry-wide higher education initiatives (Common Solutions Group), as well as lead to new collaborative work across UC through the Working Smarter initiatives.

F. If applicable, describe how the proposed solution may enable additional projects to be considered.

If costs are lowered dramatically as expected, we can deploy elite technical staff on projects that directly serve the University mission. In addition, the deployment of the proposed solution will directly benefit other OE projects including Berkeley 2.0, and the UC Portal project, which both depend on email and calendar interfaces.

G. What is the impact of the proposed solution on the existing systems and processes? Does it eliminate the need for existing systems and processes?

There will likely be a more unified approach to identity management so instead of needing three sets of credentials; the Calnet ID could be used for access to documents, email and calendar.

We can eliminate the need for many expensive meetings to coordinate office productivity software procurements.

Additionally the proposed solution would positively affect disk imaging requirements, setting up new computers, dealing with custom solutions to the syncing of mobile devices, end user support requirements, virtual meetings, effective asynchronous communications and new media handling, including audio and video.

A major benefit of the project will be capturing savings from the retirement and decommission of several enterprise systems currently running mail, calendar, collaboration platform, and business process around online document sharing.

H. What is the impact on the proposed solution on the workload?

Profile/Impact in hours	Current Workload	1-time workload requirement	Ongoing workload requirement
Student		1 Hour orientation + on-line training by the vendors as needed, when needed.	Better communications and data/information management for everything we do – more in less time.
Staff		1-4 hours each for training on new offerings depending on familiarity with toolset.	Same as Students
Faculty		Same as Staff	Same as Students

IV. WORK PLAN AND PROPOSED SOLUTION DESIGN

A. Provide a statement of:

- Deliverables — results the solution must deliver to achieve the stated objectives.
- Constraints — factors that may limit the options for providing the solution (e.g., an inflexible deadline).

The project to rollout a major change to what amount to three mission critical, albeit commodity IT systems cannot be taken lightly. The project falls into three primary phases:

Phase 1 - Campus Requirements Review and Vendor Selection

Phase 1 of the project is focused on the comprehensive documenting of campus requirements to assure community input, and that the input is treated in a systematic way. The implementation team will identify populations that require special features, and an exception process to accommodate these needs.

Phase 2 - Implementation Planning, Preparation and Change Management

Phase 2 involves a number of campus change management activities, technical activities such as scripting migration scripts, and coordinating with shared service centers for management of service rollouts. A key aspect of the project will be determination of how to handle the transition.

STRATEGIES:

For calendars, the most sensible approach will be a “big bang” transition, since this removes the need for expensive, complex and short-lived custom programming to keep multiple calendar systems in synch. Instead, the calendars will cut-over at a fixed point in time, and using parallel infrastructure the team can ensure that the transition is heavily scripted, with full trial run through to ensure proper testing and user acceptance.

For email, a “big bang” does not work at all. Many users will have large amounts of email, which may reside on their computers or on servers. Users may also have desktop clients that will need reconfiguration. The email systems can easily be run in parallel, and so the high-touch approach and targeted techniques used for different populations will make the difference between success and failure. We expect, given the enormity of the population and the complexity of some user requirements, that full transition may not be completed for two years (with most transitioned over three-to-six months).

For web-based productivity software, we will need to determine the migration requirements and options for moving user documents potentially from current systems like CalShare to web-based vendor systems. This will require detailed analysis and planning. If locally installed software is obtained through the project, the media can be made available broadly within the campus community to regional IT staff almost immediately for their staging and upgrade.

Training

As a part of the transition, the project will need to develop a training and outreach program to work on conjunction with the shared service center end user support teams, the campus service center support channels, and other campus partners like Educational Technology Services, IST. Training should include practices and programs to help the campus community best use the technologies being developed and rolled out, and aligned with vendor recommended practices, data integration and overall document and data management.

The solutions being proposed have on-line text, audio, video, and user group support options – promoting *just-in-time* training.

- 1) Provide a work plan for the proposed solution with high-level steps to complete the solution, including timeline.
(Try to limit your plan to no more than seven steps.)

	MILESTONE	TIMELINE
1.	Campus Requirements Documentation and Review	60 days from inception/funding
2.	Vendor Selection	90 days from inception/funding
3.	Office software solution rollout/distribution available	120 days from inception/funding
4.	Calendar migration begins – campus wide	180 days from inception/funding
5.	Email migration begins – early adopter group 1	180 days from inception/funding
6.	Campus Staged Rollout for Email begins	220 days
7.	All parallel systems decommissioned, overlap period ends	1.5 – 2 years

- 2) What are the data requirements for the proposed solution?

The biggest data requirements for the proposed solutions are data security, and privacy management of the various options selected. In addition, credential management and data integration with our Calnet Identity Management team will be critical. Data integration for end user email clients, and device synchronization must also be managed.

3) What are the technical requirements for the proposed solution?

The technical requirements must be determined by the implementation team, and will depend on which vendor options are selected. Since the project objective includes the outsourcing of a significant amount of IT, there will be a net reduction in technical requirements from what is needed today. In the interim, the transition will require skilled IT staff and detailed impact planning. In addition hardware and skilled IT consulting must be available during the transition from the current solutions to the new software as a service - hosted direction, which will cause a period of duplicated environments. There will also be a significant coding and systems analysis expense in moving data from our old systems into a vendor managed service.

4) What are the greatest risks for the proposed solution and the plan to reduce or eliminate the risks?

	RISK	MITIGATION PLAN
1.	Staff flight If staff quit before the migration is complete we risk business continuity for our current systems, and will also lose help developing migration procedures.	If this happens the University will need to spend very large amounts of money to procure top-level talent, likely through expensive vendors. We hope to avoid this by developing interesting opportunities that serve the University mission, which they will ramp up on as the activities being outsourced ramp down.
2.	Technology / vendor failure	The plans, as they develop will include multiple contingency plans so that the implementation team can course-correct if vendor products do not perform as advertised, and a detailed testing program prior to rollouts
3.	Fear of change	Traditionally, UC Berkeley has not procured IT services – we have depended on staff to provide home-developed tools. The culture shift must be managed using extensive change management, and frequent communications in multiple formats to hear and address concerns.
4.	Migration problems	As soon as vendor selection has completed, the implementation team will begin developing rigorous processes to ensure a smooth migration. In addition to the technical aspects, a significant cross-organizational coordination effort must be undertaken to align work of end user support technicians, back-end developers building migration tools, and the change management and communications teams.
5.	Vendor lock-in, raising prices	The contracts must be managed so that the University can obtain a reasonable return on investment and clear terms about the circumstances and degree to which vendors can raise prices, add, change or remove services – and with sufficient notice.
6.	Long term sustainability and direction correctness	A complete digital media management strategy and solution is needed now, and must be continually refreshed, with platform directional calibrations every 2-3 years. The pace of change is accelerating, not linear. Personal inexpensive capabilities are now greater than the services provided on campus. A clear strategy for the overall infrastructure, along with mobile services and this proposal for software as a service - hosted (integrated) productivity suite will help.
7.	Data security	There are multiple security issues and challenges that are currently being addressed by academic, medical and government groups. Solutions are emerging and being put in place. We expect the implementation team to implement models that fit the regulatory, security and privacy requirements at UC Berkeley.

5) How does the proposed work plan allow for evaluation and course correction to ensure the outcomes meet the campus needs?

The implementation team will have a high level steering committee under academic leadership, and an advisory council of representative community members to aid in rapid decision-making. The general process will be an iterative one that allows for changes to approach as needed, while seeking as aggressive a schedule as possible.

V. CHANGE MANAGEMENT

A. What is the change management plan to successfully implement the outcomes of the proposed solution?

The team will use senior technical talent from two departments and 5 different teams within IST, an advisory body, steering committee, dedicated consultant to facilitate requirements gathering and project management, and the communications team in the office of the CIO. In addition, the program will run a website dedicated to managing the transition, and will specially train desktop support staff in IST and the Shared Service Centers.

Many students and faculty have asked for these changes both publically and in the feedback to OE IT initiative conversations. Even so, it still will require an enticing shared vision, communicated often, that answers the frustrations of current users and gives them even more. Services and tools to really look forward to!

B. What incentives and/or disincentives are proposed to influence behavioral changes necessary for the successful outcome of the proposed solution?

Basic incentives include improved user experience (so users will want the new solution), and also economic subsidies so that campus will underwrite what will be a massive net cost savings when it is brought to the community.

C. Who has been identified as the change leaders and implementers to carry out the changes necessary for the successful outcome of the proposed solution?

Change Leaders – Shelton Waggener, Campus Deans.

The implementation team is the Campus Technology Services department in IST, along with staff of any support shared service centers in place.

VI. FUNDING MODEL AND BUDGET

A. Could the proposed solution move forward with partial funding? If yes, describe the revised scope, including the associated savings impact.

With only partial funding, we would scale back or remove some or all elements of the productivity and collaboration tools, and start with free email and calendar options. This option would dramatically lessen the long-term savings to campus, reduce interoperability, and is not recommended. The implementation team might be able to design a solution for an extended funding flow requirement, with the likely result of an overall more costly and complex implementation plan. Partial funding might also force the use of cost recovery mechanisms which would lead to much lower adoption rates and higher complexity of administration and transition.

B. What is the plan for sustainable funding to support ongoing operations of the proposed solution?

Once launched, the program is projected on a per-head cost basis to be cheaper than current solutions (though higher cost to campus overall), taking into account the unified approach to managing email, calendar, office productivity software, and collaboration tools. Current funding requirements can be reduced and key talent reallocated to other campus mission critical efforts.

C. Please download and fill out the OE Resource Request Budget Template located at [location] and follow the instructions on the first worksheet in the workbook to complete the budget and line descriptions. Include both completed sheets with the Resource Request.

VII. ASSESSMENT PLAN

Please use the table below to detail your metrics.

METRIC CATEGORY	SPECIFIC MEASURE	MEASURE BASIS	DATA COLLECTION METHOD	DATA COLLECTION FREQUENCY	FUNCTIONAL OWNER OF DATA COLLECTION	LARGER GOAL TO WHICH METRIC RELATES
FINANCIAL PERFORMANCE						
1. Lower unit cost for the productivity software suite	Avg price	Per item	Ledger report	Annually	IT Procurement	?
OPERATIONAL PERFORMANCE						
1 Campus use of software as a service - hosted Productivity Suite: email, calendars, messaging.	% of campus using suite	User	Table of users	QTR	IST	Common Platform – Campus wide communications
PRODUCT / SERVICE QUALITY						
1 Uptime of the platform/features	% Availability	Hours/Year	Downtime Log	Monthly	Vendor?	24/7 campus wide communications
EMPLOYEE SATISFACTION						
1 User Satisfaction of common tools	Meets user needs	Satisfaction scale	On-Line Questionnaire	QTR	IST/Vendor	Continuous Improvement of service to campus
CUSTOMER SATISFACTION?						
1						
PUBLIC RESPONSIBILITY						
1						
SUPPLIER PERFORMANCE						
1 Data Security	# of incidents	Per event and severity	Log/Resolution Report	QTR	IST/Vendor	Data Security is a critical success factor for the campus – and avoids financial risks