



OE PROJECT CHARTER—

Transformation Support Services

PROJECT NAME:	Transformation Support Services (TSS)
PREPARED BY:	Barbara Broque
DATE (MM/DD/YYYY):	10/10/12

PROJECT CHARTER VERSION HISTORY		
VERSION	DATE (MM/DD/YYYY)	COMMENTS (DRAFT, SIGNED, REVISED – CURRENT STATUS)
1.0	07/15/2012	Initial Draft
2.0	10/10/12	draft for circulation/comment

DOCUMENT PURPOSE

The Project Charter documents the formal conversation between the Project Sponsor and the Project Manager/Team, including the definition of success for the project.

Once approved, the Project Charter communicates the current agreement between the Project Sponsor and the Project Team throughout the lifecycle of a project. The Charter provides a high-level overview of the project including the definition of project success, and project resource (people and funds) requirements.

Requests and additions to the project scope are considered “out-of-scope” for the current project. When a scope change is required, document a change request that includes an impact analysis of project cost, resources, schedule, and risk. The Project Sponsor then formally approves the scope change request.

The project manager will retain additional documents that provide detail on the management of the project, including a communications plan, an issues log, a risk log, a change management plan, a budget, and a work schedule.

REVIEW & APPROVAL

(The Project Sponsor signature indicates approval of the Project Charter, and authorizes the Project Manager/Team to use identified resources to proceed with the detailed planning and execution of the project; using this charter as guide.)

PROJECT SPONSOR(S) NAME	SIGNATURE	DATE
John Wilton		
Jeannine Raymond (functional sponsor)		
George Breslauer		
Phyllis Hoffman (functional sponsor)		



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CASE FOR CHANGE

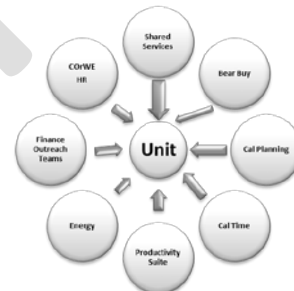
(What is the Current Situation?)

UC Berkeley is concurrently implementing over 20 Operational Excellence (OE) projects across 35 organizational units in more than 200 locations across campus. Individually and collectively, these projects support OE's overarching goals—administrative cost reduction, operational effectiveness & efficiency, and continuous improvement & high performance—but they approach these goals from a variety of perspectives. Many projects, if not most, involve more than one type of operational change—to systems, processes, behavior, culture, or strategy.

One common theme emerging from conversations with unit leaders and managers is that successful OE project implementation requires project management skills, technical adaptability, change management skills, and a focus on staff development—not to mention that the managers themselves are learning new ways of doing business!—and consumes a significant amount of managerial and staff time and energy. Leaders also recognize that to fully operationalize the benefits of OE projects, they will likely need to plan for and manage multiple aspects of organizational redesign and change, such as:

- **Strategy**—the unit's vision of future state.
- **Structure**—ensuring organizational alignment with the unit's mission and resources.
- **Process**—redesigning work flows & processes to take full advantage of project opportunities.
- **People**—communicating, coaching, training, developing, and otherwise supporting staff to ensure staff transitions to new roles, processes, and technologies are successful and satisfying.

Unit managers and staff describe the implementation work ahead as both exhilarating and daunting. While they truly appreciate the potential for OE projects to create a bright and sustainable future, the illustration at right captures their current experience. As a result, some managers have requested assistance to navigate and prioritize expectations and requests from multiple projects, and help their staffs adapt to new ways of organizing and performing work.



PURPOSE

(What problem will be solved by the project? What value does this project add to the organization? How does this project align with the strategic priorities of the organization? What benefits are expected once the project is completed?)

Transformation Support Services (TSS) will provide expert consulting and analytical services to help leaders and managers achieve the goals of operational excellence within their units. We propose to develop a menu of services based on our understanding of units' priority needs with respect to managing the impact of OE projects on their operations.

What problem will be solved by the project? Operational Excellence represents a comprehensive transformation of the way in which the Berkeley campus conducts all aspects of its administrative operations. We have not undertaken such a significant organizational transformation in recent memory, if ever. Consequently, while we are rapidly developing the tools, skills, and capacity to



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implement each major individual project—thanks largely to the efforts of the OE program office and the individual project teams—we lack both the infrastructure, tools and “muscle memory” to ensure the projects’ successful coordination and integration at the unit level. Put another way, each OE project team is focused, understandably, on ensuring the successful implementation of *its own project*; whereas individual managers have the responsibility to ensure the successful *integration of all projects* into the ongoing work of their units. While the campus managers are generally experienced and skilled, this moment in time is unique in the sheer volume, magnitude, and complexity of change; and, as a result, many managers report feeling ill equipped to manage the multiplicity of changes they must successfully oversee.

What value does the project add to the organization? The purpose of the TSS project is to address this concern and to provide unit leaders and managers with the tools, skills, and capacity to enable their successful transformation to a new operating environment—now and in the future. In part this goal is met through the activities described under “Scope” below; but, TSS will also be in a unique position—by virtue of working with units campus-wide—to observe patterns, problems, and solutions that span multiple units, and to develop common solutions and share best practices that transcend organizational boundaries.

TSS will provide focused services in Organizational Development and Human Resources, driven by unit requests for help addressing specific changes in their operations so they may successfully leverage the benefits entailed in OE projects. The full TSS team includes individuals with expertise in organizational development, employee and labor relations, compensation and classification, talent acquisition and development, marketing and communications, financial management, analytics, project management, and business process (re)design. The TSS team will provide resources to unit leaders and managers that will enable them to engage purposively in systemic organizational transformation, and to re-envision their units after the successful integration of fully implemented OE projects.

The team provides customized consulting and organization effectiveness services, workshops and focus groups, and HR technical expertise to help units achieve OE goals through appropriate staffing solutions, process and structural improvements, and integration of new ways of working. *It follows a collaborative, partnership approach where unit managers and staff create solutions that work for them*, recognizing that unit managers are accountable for achieving OE and unit-specific goals. To be effective, TSS must also establish trusting partnerships with other OE projects—to develop coordinated approaches and plans for working with units, to share appropriate information, to avoid cacophonous communication and mixed messages, and to model the benefits of campus-wide cooperation.

How does the project align with the strategic priorities of the organization? At its core, TSS is designed to equip campus managers to implement change now and in the future. It develops the skills needed for continuous improvement—a key pillar of the Operational Excellence initiative. Additionally, TSS consulting services will support improvements to operating effectiveness and efficiency, help position client units to take advantage of administrative cost savings and realize the financial benefits of OE project implementation for their core program activities. As well, the team establishes working agreements with unit leaders that specify the work of the unit managers and staff and the work of the TSS team to achieve specific outcomes—these engagement letters mirror many elements of a project charter and other project management tools, thereby introducing this disciplined approach throughout the campus.



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What benefits are expected once the project is completed? Academic and administrative leaders will have achieved a successful transition to a new operating environment—characterized by sustained service delivery capabilities, effective and efficient processes, high performing staff, reduced administrative costs, and organizational structures and processes that are aligned with their strategic program goals.

As importantly, managers across the campus will have developed the capabilities needed for ongoing, continuous improvement—skills they will use even after OE projects have been fully implemented. Additionally, TSS service delivery will serve as a model for how central campus functions can collaboratively support units through periods of transition—a model that we hope will survive well beyond the 18 months of the TSS project.

RESULTS

(What does success look like? How do we know that the problem described above is resolved? This typically involves clarifying metrics for operations once the project is completed.)

Because TSS services are voluntarily requested by interested units, results are likely to vary engagement by engagement. Each client will be afforded the opportunity to specify desired outcomes and related outcome measures. Except for item #1, the outcomes and measures listed below are necessarily somewhat speculative, based on the types of engagements we anticipate at the time of this writing.

#	OUTCOME	MEASURE
1	A toolkit available to units campus-wide, developed based on patterns we observe from our work across campus. (See item #2 under “Scope” below.)	• Compendium of best practices, case studies, and success stories • Shared solutions to common problems (e.g., the “fractional FTE” problem) • Accelerated campus-wide progress toward a culture of continuous improvement
3	Realized financial benefits—at the unit level—of administrative cost reductions afforded by OE projects.	• Financial savings identified by individual OE projects are realized at the unit level. • Clear line of sight between administrative cost savings and budget/strategy documents.
4	Improved operating effectiveness and efficiency.	• Documented process improvement measures such as reduced wait time, improved customer service scores, etc., as identified by the client. • Solid unit results on related campus-wide metrics, once they are adopted.
5	Organizational capacity for continuous improvement and team learning / ongoing learning.	• Self-reports by unit leaders and managers. • SPOT and Achievement awards that reference innovation, continuous improvement, agile management, and related plaudits. • Unit plans for learning and development.
6	Organizational structures and business processes that are aligned with unit strategic goals.	• Clear line of sight between administrative cost savings and budget/strategy documents. • Solid unit results on related campus-wide metrics, once they are adopted.



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SCOPE

(The scope defines the boundaries in terms of where the project begins and ends. The scope describes what will be delivered - where, when, and how. It describes the services, functions, systems, solutions, or tangible products for which the sponsor will take delivery.)

To provide the value and achieve the results summarized above, the TSS team defines its project scope as follows:

1. **Establish an effective project infrastructure**—to enable efficient and repeatable TSS service delivery;
2. **Develop and offer a portfolio of tools and methodologies (a.k.a., a “toolkit”)** that can be used by units across the campus, with or without TSS assistance—to enable units to participate rapidly in transformation activities based on their interest and need;
3. **Provide individually tailored consulting engagements** to schools, colleges, departments, and administrative units—to respect individual unit differences while cross-fertilizing learning across campus units; and,
4. **Act as “service brokers”**, introducing client units to appropriate value-added services offered by others on campus—in order to foster and facilitate unit capacity for change management and continuous improvement.

Each is described briefly below.

1. **Establish an effective project infrastructure—to enable efficient and repeatable TSS service delivery.** By taking the time to establish an effective project infrastructure, TSS will model the OE goal of administrative efficiency. Key components of the infrastructure include the following:
 - 1.1 **Client management structure**—to ensure that each unit is assigned a Client Services Coordinator who is focused and dedicated to the success of the unit.
 - 1.2 **Client management software** (e.g., Salesforce)—to ensure that all TSS team members have access to the same information about clients, and to ensure timely responses to client inquiries and issues;
 - 1.3 **Project management software** (e.g., MS Project)—to capture effort, effectively manage resources, and ensure timeliness of client project deliverables;
 - 1.4 **Collaboration tools** (e.g., Research Hub)—to enable efficient document development and sharing among team members and with clients;
 - 1.5 **Standardized templates for client work** (e.g., engagement letters)—to facilitate and document agreements about project work plans, deliverables, resources, and timelines;



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1.6 *TSS evaluation form*—to ensure we are meeting client expectations and to form the basis for our own continuous improvement; and,

1.7 *Project reporting templates* (e.g., engagement summaries)—to capture common issues and lessons learned in ways that can be easily shared without violating client confidences.

Establishing the infrastructure enables us to provide consistent client service and satisfy campus reporting needs, and enhances CORWE's ability to sustain consultancy for the longer term after the project is over.

2. ***Develop and offer a portfolio of tools and methodologies (a.k.a., a “toolkit”) that can be used by units across the campus, with or without TSS assistance—to enable units to participate rapidly in transformation activities based on their interest and need.*** Although OE projects will affect different parts of the campus in different ways and at different times, there are some commonalities. The toolkit will enable organizations to consider these impacts and to redesign their futures to reap the advantages of OE. For the initial implementation period, tools will include the following:

2.1 A diagnostic tool to help units identify the impacts of Campus Shared Services on the work and employees remaining in the organization (i.e., the “fractional FTE diagnostic”);

2.2 A calendar illustrating when each OE project will affect the individual department or administrative unit, and a companion “heat map” to help units identify the potential impacts on their operations;

2.3 An organizational assessment survey to help pinpoint areas of organizational strength and fragility and to assist leaders and managers to focus their improvement efforts appropriately;

2.4 A checklist of considerations—including communications plans and change-readiness activity—to help units prepare for each project, or prepare for future staffing plans or organizational structures;

2.5 Standardized approach(es) to short-term staffing needs during transitional times;

2.6 Streamlined recruitment support to facilitate job-sharing between different departments or administrative units;

2.7 Workshops to enhance the skills of intact or emerging work teams on topics of common campus-wide interest or need—e.g., facilitation skills, business process analysis, project management, classification/compensation, performance management or discipline, designing effective meetings, and so forth; and,

2.8 A repository of case studies, best practices and success stories that can enlighten and inspire others.



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Some units may choose to use these tools on their own, while others may request TSS assistance to use the tools or to identify and implement targeted organizational changes based on what the tools reveal. The toolkit will expand throughout the project based on units' self-reported needs and TSS findings on emerging campus-wide issues and concerns.

3. ***Provide individually tailored consulting engagements to schools, colleges, departments, and administrative units—to respect individual unit differences while cross-fertilizing learning across campus units.*** Individualized consulting engagements enable us to respond to a wide variety of problems presented by our clients (i.e., units), to help them distinguish between symptoms and problems, and to collaborate on solutions that work for them. In all cases, the consultancy is a close partnership between TSS and the client—recognizing that the right “solution” will always be specific to the organization and that managers are responsible for determining how best to shape their organizations' futures. Our consulting engagements will utilize standard frameworks and methodologies, enabling us to provide consistent levels of service and develop a common language across campus. Examples of consulting engagements include the following.

- 3.1 Organizational diagnosis—helping units to clarify the factors contributing to their presenting problem and to identify appropriate solutions;
- 3.2 Strategic assessments—utilizing proven methodologies (such as the Excellence in Higher Education assessments) to determine administrative areas requiring focused leadership attention;
- 3.3 Organizational realignment and transition planning—assisting units to develop staffing plans aligned with their financial circumstances, program needs, and strategic goals;
- 3.4 Business process redesign—ensuring that business processes optimize the organizational changes and technology offerings resulting from OE projects;
- 3.5 Coaching for managers and leaders—individualized approaches to leading high performance teams; and
- 3.6 Change management—helping organizations plan and manage the impact of multiple OE projects.

Consulting engagements may include assistance with staff transitions—retirements, reassignments, recruitments, reclassifications, or layoffs. In some instances, it might prove productive for consulting services to be collaborations between the TSS team and other OE projects (e.g., Metrics) or campus functional teams (e.g., Outreach). To the greatest extent possible, engagement plans for these consulting projects will build on existing information—such as survey results, Academic Program Reviews, data gathered by other OE projects, etc.—in order to avoid “survey fatigue” and to demonstrate the value of cross-campus collaboration.

4. ***Act as “service brokers”, introducing client units to appropriate value-added services offered by others on campus—in order to foster and facilitate unit capacity for change management and continuous improvement.*** In many cases, preliminary conversations or ongoing consulting



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engagements may identify needs and opportunities not directly served by TSS—in which case TSS will introduce our client to appropriate campus services. We will reach out to the directors of the following organizations, to introduce TSS and to reach agreement about how best to partner together for the benefit of the campus and its individual units:

- 4.1 Advisory Services—recommendations to ensure that revised business processes retain required controls and remain compliance with key policies and regulations;
- 4.2 Care Services—help for organizations feeling the loss of colleagues or wishing to improve resilience in the face of change;
- 4.3 Career services—resources for staff wishing to pursue new career opportunities;
- 4.4 Staff Ombuds Office—resources for conflict resolution;
- 4.5 Financial Services Outreach—support for departmental migration to all-funds budgeting; and,
- 4.6 Space planning—advice on optimizing space utilization following organizational realignments or staff transitions.

In many cases, services such as the above might be an integral part of a portfolio of client work (rather than simple referrals), with TSS doing some of the work and providing overall project management to ensure the efficient and effective coordination of all portions of the engagement.

The following activities are outside the scope of TSS. Should we encounter these issues during any given engagement we would make referrals to sources of support when possible, but any such referral would be the extent of our work. TSS will not:

- Address pre-existing individual performance issues (these will be referred to HR professionals, some of whom may also be members of the TSS team);
- Conduct financial compliance audits (these will be referred to the Central Campus Budget Office or to Audit & Advisory Services, as appropriate);
- Establish unit savings targets (though we will assist units to meet their own targets or those establish by campus authorities);
- Monitor progress toward specific goals/targets established by OE projects or campus leaders (although such information will certainly inform service offerings and our approach to consultancies);
- Provide consulting services to other OE projects (our scope is limited to the 35 units in Appendix A); or



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- Provide transition support for individual staff whose positions are eliminated (these services are already offered by Human Resources).

PROJECT CONSTRAINTS & ASSUMPTIONS	
<i>(List the known and anticipated constraints, and the initial assumptions for the project.)</i>	
#	NAME
Assumptions	
1	If we build it, they will come. (With a little help from our outreach efforts, of course...)
2	TSS is about enabling administrative excellence. Academic matters are out of scope
3	Other OE projects are implemented successfully—TSS helps units build on those project outcomes and take best advantage of the attendant opportunities.
4	Unit leaders retain all decision-making authority within their units—TSS provides tools, guidance, and recommendations to support the decision-making processes of unit leaders.
Constraints	
1	TSS is an optional service—despite our best marketing efforts, not all unit leaders will wish to use our services.
2	The decentralized nature of the campus may in some instances constrain our ability to develop meaningful common/standard tools for our toolkit.
3	Some units may not be “ready” for TSS services—leaders may not be prepared to make difficult decisions, may not be able to devote sufficient staff resources to the projects, etc.

PROJECT MILESTONES & DELIVERABLES		
<i>(List the major milestones and deliverables of the project.)</i>		
MILESTONE	DELIVERABLES	DATE
Establish and effectively utilize project infrastructure tools. <i>(Reference: scope item #1.)</i>	• Collaboration tool • Project management software • Client management software • Standard templates for client work, TSS evaluations, and project reporting	10/26/12
Provide services to clients	• See scope	Ongoing
Hold 1 st quarterly TSS progress meeting (full team invited).	• Document progress to date re: project milestones. • Identify lessons learned. • Revise charter, staffing plan, or project deliverables, as needed.	11/15/12



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PROJECT MILESTONES & DELIVERABLES (List the major milestones and deliverables of the project.)		
MILESTONE	DELIVERABLES	DATE
Meet individually with each OE project manager. (Reference: scope items #2-4.)	• Understand the goals of each project. • Document the potential impact on units. • Determine how best to utilize that understanding (i.e., toolkit, consulting engagements, and/or brokerage services).	11/16/12
Develop initial toolkit—preliminary tools will be posted to web site when appropriate. (Reference: scope item #2.)	• Fractional FTE diagnostic tool • Consolidated OE project calendar and impact assessment tool • Organizational assessment survey • Unit readiness checklist • Short-term staffing solution • Job-share recruitment solution • Workshops on emerging issues • Initial repository of best practices and inspirational stories	11/30/12
Meet individually with the Directors of key campus service units with whom TSS might partner to provide services. (Reference: scope item #4.)	• Understand services of each unit. • Document the conditions under which partnership or referrals from TSS will be appropriate.	11/30/12
Finalize standard consulting tools and common strategic framework(s) for individual consulting engagements; train all TSS staff as needed. (Reference: scope item #3.)	• Methodology for organizational diagnosis • Strategic assessment tool • Approach to organizational realignment and transition planning • Methodology for business process analysis and redesign • Organizational and change readiness assessment tool	12/21/12
Hold 2 nd quarterly TSS progress meeting (full team invited).	• Document progress to date re: project milestones. • Identify lessons learned. • Revise charter, staffing plan, or project deliverables, as needed.	2/13/13
Hold 3 rd quarterly TSS progress meeting (full team invited).	• Document progress to date re: project milestones. • Identify lessons learned. • Revise charter, staffing plan, or project deliverables, as needed.	5/8/13



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PROJECT MILESTONES & DELIVERABLES (List the major milestones and deliverables of the project.)		
MILESTONE	DELIVERABLES	DATE
Hold 4 th quarterly TSS progress meeting (full team invited).	- Document progress to date re: project milestones. - Identify lessons learned. - Revise charter, staffing plan, or project deliverables, as needed.	8/14/13
Hold 5 th quarterly TSS progress meeting (full team invited) . This meeting may be the final meeting, as the project staffing was approved for 18 months ending January 2014.	- Document progress to date re: project milestones. - Identify lessons learned. - Revise charter, staffing plan, or project deliverables, as needed. - Develop a recommendation to project sponsors re: continuation or termination of the project.	11/13/13

IMPACT STATEMENT (List the impact this project may have on existing systems and populations.)		
POTENTIAL IMPACT	WHAT AND WHO IS IMPACTED	RATING (1-5) 1: Low 3: Med 5: High
Realized financial benefits—at the unit level—of administrative cost reductions afforded by OE projects.	Deans, Vice Chancellors, CAOs, Chiefs of Staff; unit staff	4
Improved operating effectiveness and efficiency.	Unit staff	4
Organizational capacity for continuous improvement.	Unit managers and staff	4
Organizational structures and business processes that are aligned with unit strategic goals.	Deans, Vice Chancellors, CAOs, Chiefs of Staff.	4

FINANCE DESCRIPTION (Provide a high level narrative overview on the estimated investment requirements, the savings targets, and the ongoing funding model.)
Investment Requirements. TSS is a collaboration of HR, CoRWE, and the OE Project Office. - During the project, the OEPO is funding the following HR positions. As needed, HR will also contribute additional staff time. 1.0 FTE communications specialist 1.0 FTE recruitment specialist 1.0 FTE recruitment assistant 1.0 FTE employee/labor relations specialist



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- o 0.2 FTE compensation specialist
- o 1.0 FTE data analyst
- During the project, CORWE will utilize staff development funding to support the following positions.
 - o 1.0 FTE project manager & lead consultant (OD5)
 - o 1.0 FTE change manager & senior consultant (OD5)
 - o 2.0 FTE additional organizational development consultants; or:
 - their equivalent in professional services contracts for outside consultants
 - their equivalent in release time for campus personnel with appropriate functional expertise
 - o 1.0 FTE administrative coordination

Savings Targets. The project *per se* does not have any savings targets. The project scope includes assisting client units to reach their own savings targets by developing efficient and effective organizational structures and business processes.

Ongoing Funding Model. Not applicable; the project is designed to end after 18 months or at such time as most OE projects have been fully implemented. During the course of the project, CORWE and HR will explore how to embed valued services into the ongoing operations of CORWE and HR. Funding proposals will emerge as part of the normal budget process.

RISKS

(Identify the high-level project risks and the strategies to mitigate them.)

RISK	MITIGATION STRATEGY
Lack of unit buy-in and participation (related to optional nature of TSS services)	• Ongoing support and promotion of TSS through senior leaders and campus change agents • Active outreach to units on a direct by-unit basis • Select engagements with initial units that lead to quick wins and early success stories
Insufficient understanding of other OE projects and their impacts on units	• Regular meetings with other OE projects to develop strong relationships and foster information sharing • Utilize influence and support of OEPO and structure of RD6 meetings



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RISKS

(Identify the high-level project risks and the strategies to mitigate them.)

RISK	MITIGATION STRATEGY
Lack of implementation follow-up by units	• Clear engagement letters developed jointly with the units • Well-structured implementation plan with clear deliverables, milestones, roles and responsibilities • Post-implementation check-ins to verify sustained changes and improvements
Loss of project team members and resulting disruption and loss of know-how	• Management support, clear visioning, and appropriate resource availability
Over-reliance on external consultants who may not have sufficiently deep understanding of campus culture or credibility with unit leaders.	• Structured, comprehensive onboarding process for outside consultants. • Staged engagements to facilitate consultant learning about UC Berkeley

COMMUNICATION

(Highlight the communication requirements between the Sponsor, the Key Stakeholders and the Project Team, including the frequency of check-ins, project reviews, and status reports (in person and written).)

- Bi-weekly check-in meetings with functional sponsors
- Monthly meeting with OEPO Director
- Weekly meetings with CORWE Director
- Web-site updates as needed, but uploads at least once a month

The nature of the TSS project requires close work directly with stakeholders—units and other OE project leads— on an ongoing basis. Therefore ongoing stakeholder communication exceeds that of most other projects.



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APPENDIX A - PROJECT ROLES & RESPONSIBILITIES

Name the members of the project team.

PROJECT SPONSOR: Provides overall direction, guidance, and funding for the project.	
RESPONSIBILITIES include setting the vision and strategic direction, approving the project charter and plan; securing resources for the project; confirming the project's goals and objectives; keeping abreast of major project activities; making decisions on escalated issues; and assisting in the resolution of roadblocks.	
NAME	John Wilton, Sponsor; Jeannine Raymond, Functional Sponsor
NAME	George Breslauer, Sponsor; Phyllis Hoffman, Functional Sponsor

FUNCTIONAL OWNER: Manages the impact of the project in their functional area.	
RESPONSIBILITIES include ensuring agreed-upon project tasks and deliverables are completed, incorporating the views of their customers, providing functional expertise in a particular area, articulating requirements, working to ensure that business needs are met, and defining ways to embed valuable components of the project into the ongoing operations of COrWE and HR.	
NAME	Liz Elliott

PROJECT MANAGER: Leads the team in planning and implementing the project from initiation to closure.	
RESPONSIBILITIES include scope and change management, keeping the project plan current (deliverables, schedule, and resources), issue and risk management, maintaining project documents, reporting project status, and facilitating conflict resolutions within the project and between cross-functional teams..	
NAME	Barbara Horst Broque

The PROPOSED PROJECT STEERING COMMITTEE includes key stakeholders and subject matter experts.	
RESPONSIBILITIES include providing guidance on key issues.	
NAME	TSS will not have a Steering Committee, due to the confidential nature of its work.

A SUBJECT MATTER EXPERT (SME) provides expertise on project elements including business process and current or new technical solutions.	
RESPONSIBILITIES include maintaining up-to-date experience and knowledge on the subject matter, validating recommendations, and providing advice on what is critical to the performance of a project task.	
NAME	Not applicable



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Describe the roles and responsibilities of the project participants.

PHASE 1 PROPOSED PROJECT TEAM MEMBERS			
RESPONSIBILITIES include • understanding the work to be completed, completing the research, data gathering, analysis, and documentation, • informing the project manager and team members of issues, scope changes, risks, and quality concerns, and • proactively communicate status and manage expectations.			
NAME	Liz Elliott	ROLE	Functional owner and organizational development subject matter expert
NAME	Barbara Broque	ROLE	Project manager and lead consultant
NAME	Andreas Pinterits	ROLE	Change manager and organizational consultant
NAME	Sierra White	ROLE	HR data analyst
NAME	Theresa Richmond (pending hire of TSS ER consultant)	ROLE	Employee relations subject matter expert and TSS liaison with HR employee relations consultants.
NAME	Deb Harrington	ROLE	Labor relations subject matter expert and TSS liaison with HR labor relations consultants
NAME	Rich Lau	ROLE	Compensation and classification subject matter expert and TSS liaison with HR compensation consultants
NAME	Bruce Mattos	ROLE	Talent acquisition subject matter expert and TSS liaison with HR recruiters
NAME	To be hired	ROLE	Communications specialist
NAME	To be named	ROLE	Additional organizational and/or process consultants
NAME	To be named	ROLE	Additional functional specialists as needed, likely through paid release time from their current campus positions