



Pennsylvania's State System for Higher Education

Charge for Technology Working Group

November 12, 2020

Overview

The framework for the Working Groups (WG) includes:

- [Integrations Overall Charter](#) – Provides the purpose and organizational structure for the overall Integrations initiative, including Integration Guidelines with Guiding Principles.
- [Working Group Charter](#) – Defines the roles and responsibilities of the Working Groups and articulates the purpose, goals, principles, scope, roles, and deliverables with which the WGs are charged.
- Working Group Charge (this document) – Includes specific milestones, questions, and goals to be addressed by each WG specifically.

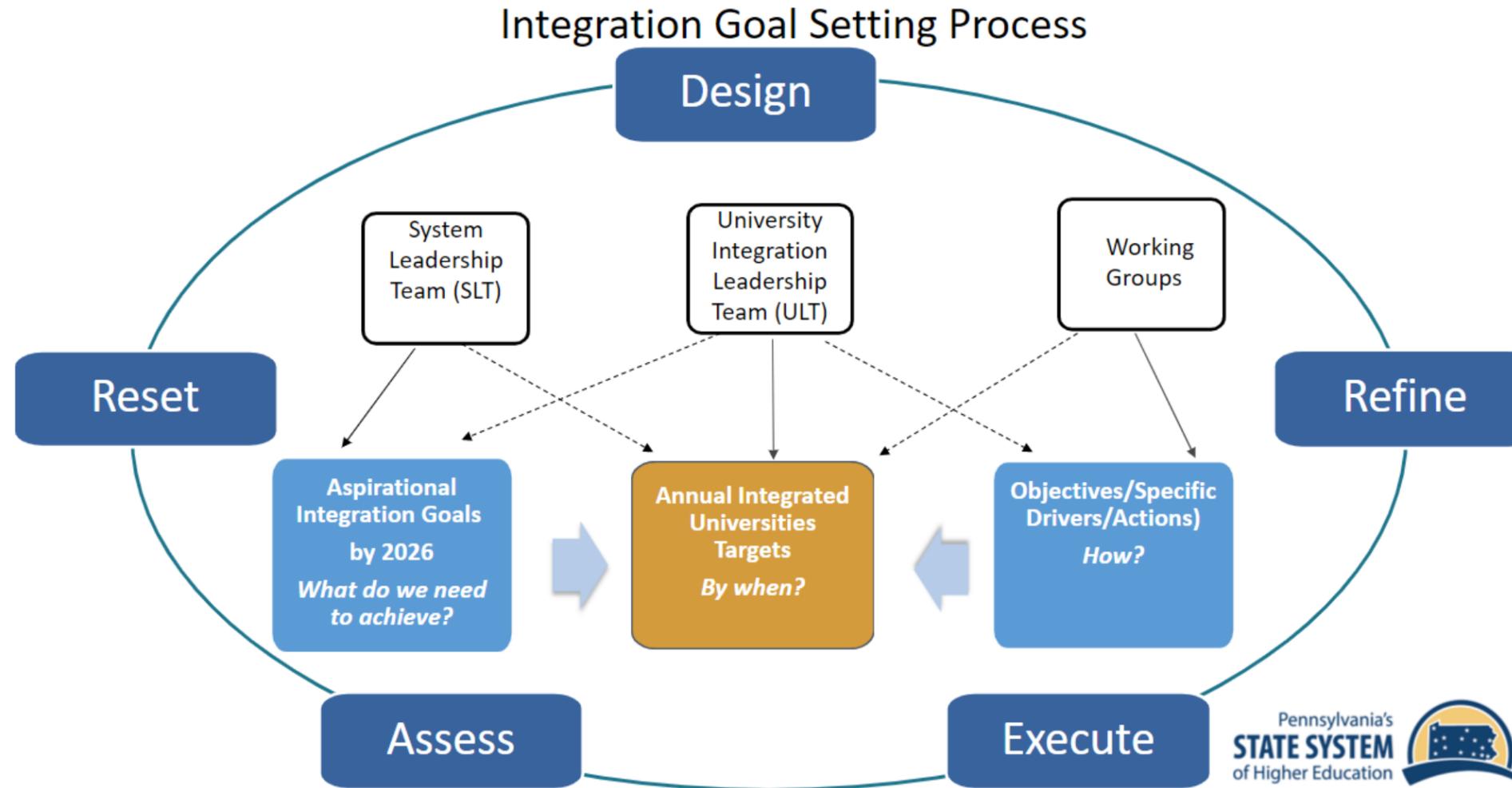
WG Deliverables and Timing

Timing	Deliverable	Details
11/18/20	Consultation Plan – Determine who to consult with, how, and how WG consultation aligns with initiative-level consultation	See <i>Consultation Plan template</i> provided on SharePoint.
12/4/20	Critical Path August 2022 – Confirm the critical path milestones and define the critical path steps and timing to meet critical path milestones for Fall 2022 (what must be done by August 2022 for successful launch and how long will it take)	See <i>Critical Path Milestones</i> and <i>Critical Path Steps template</i> provided on SharePoint.
12/11/20	Aspirational Goals and Annual Targets – Aspirational goals to accomplish by 2026, and define annual integrated institution targets to evaluate progress	See below and <i>Goals/Targets template</i> provided on SharePoint.
1/8/21	Priority 1 Questions (First Draft) – Use above to filter, prioritize, and develop draft recommendations for Priority 1 questions (i.e., key questions to define the future state) and accompanying organizational charts and impact analysis	See below, <i>Priority 1 Recommendations template</i> , and <i>Organizational Chart template</i> provided on SharePoint.
1/15/21	Priority 2 Considerations for 2022-2026 – Outline considerations for what can be done after August 2022 and how it can be sequenced (i.e., known prerequisites)	See below and <i>Priority 2 Considerations template</i> provided on SharePoint.
2/12/21	Priority 1 Questions (Second Draft) -- Update recommendations, incorporating feedback from Systems Leadership Team (SLT) on First Draft	See above.
3/12/21	Priority 1 Questions (Final Draft) – Update recommendations, incorporating feedback from SLT on Second Draft	See above.



Goal Setting

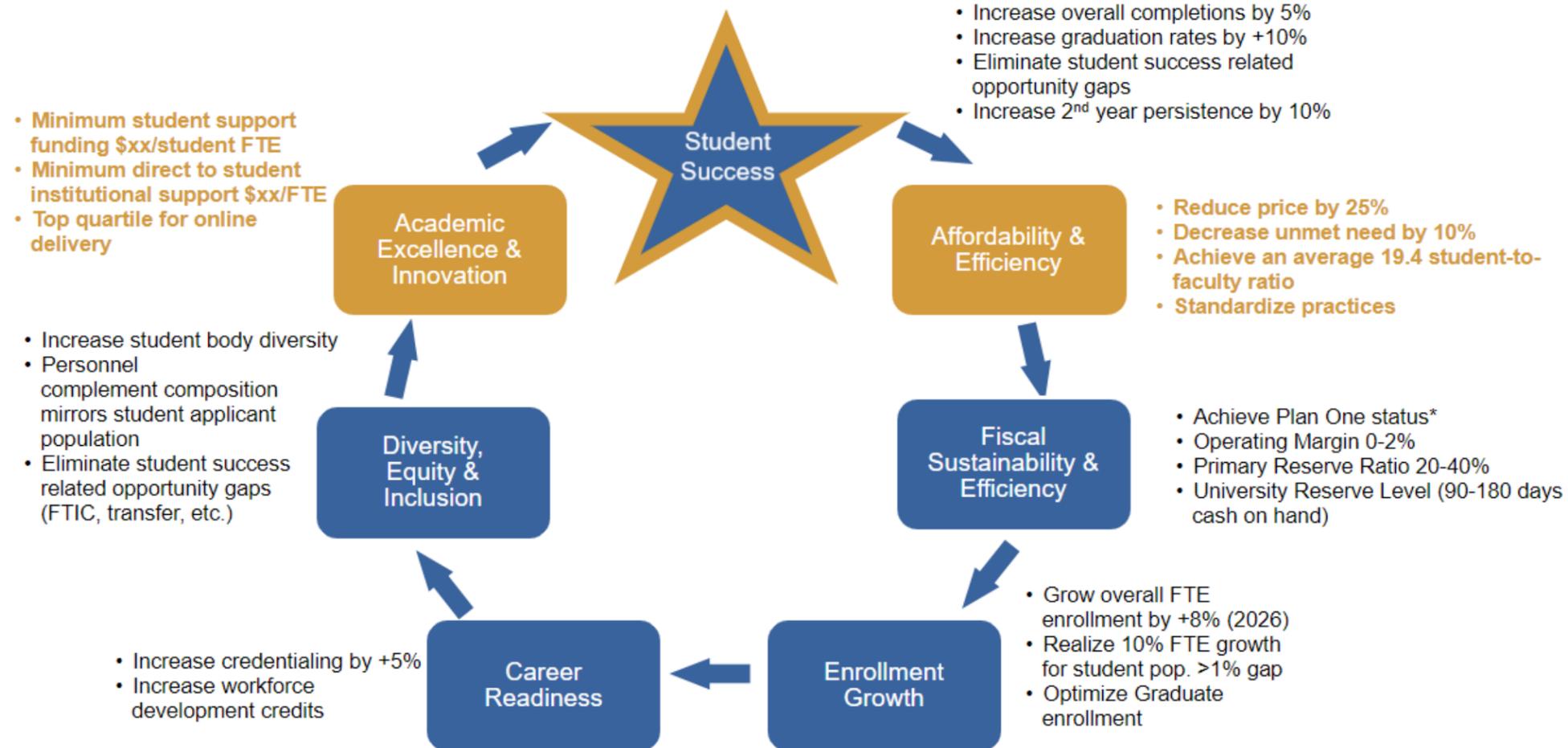
Related to the aspirational goals provided in the Integrations Initiative Charter, define annual integrated institution targets against which to evaluate progress.





The overall integration-level aspirational goals are included below and within the Integrations Initiative Charter. Address the highlighted goal(s) applicable to your WG.

Goals Relevant to Technology Working Group



Integration Overarching Considerations

- What is the current resource inventory for the area (people, facilities, technology, policies)?
- What elements can be integrated into a singular structure for performing the necessary functions (and, as an exception, which require joint and concurrent delivery models)?
- What data do we have regarding existing functions in this area? What data will inform decisions?
- What are the qualitative considerations related to integrating this function?
- Have we kept the guiding principles, goals, and objectives in mind in our efforts?
- What input from other working groups is critical to forming alternatives and recommendations?



For Each Recommendation, Assess the Impacts

- People – Student, faculty, staff, governance (e.g., trustees, organizations) – individuals impacted by the change and any know required activities to support the change (classification, side letter changes, training etc.)
- Process – Policy, procedures, contracts, partnerships, etc., that support the current state which would have to be changed to support the recommendation
- Technology – Systems, support, applications that support the recommended changes and if any updates would be required
- Finance – Required funding to implement or lead to a cost savings
- Physical Assets – Physical assets (buildings) that would be impacted by recommendations
- Compliance and Legal – Federal, state, and local laws, regulations, and other requirements that would need to be changed to implement the recommendation
- Community – Known community stakeholders impacted by the recommendation
- Benefits – Anticipated benefits associated with the recommendation – linked to goals and objectives, if possible
- Risk – Known risks associated with implementation of the recommendation

Use the considerations and questions below to discuss, prioritize, and develop draft recommendations for Priority 1 questions to define the future state and impact analysis.

	High-Level Areas of Consideration	Questions to Inform Recommendations
Technology Working Group	<p>Overall Focus Areas:</p> <ul style="list-style-type: none"> • Current State Assessment – Document current inventory of technology products, solutions and the overall IT landscape at each institution. • Technology Stack – Evaluate the applications and solutions utilized across functional areas and identify critical solutions that must be standardized upon to enable a smooth August 2022 launch. This includes a review of: <ul style="list-style-type: none"> ○ Transferability of students ○ CRM System to support an integrated enrollment strategy ○ Registrar ○ Billing ○ Recruitment ○ Admission ○ Matriculation ○ Course selection ○ Housing assignments • Infrastructure – Review infrastructure elements (network, telecommunications, servers, clusters, server operating systems, data centers, etc.) to identify opportunities for additional technology convergence • Identity – Review the identity management architectures in place and identify recommendations to enable seamless access to IT resources across functional areas for all user groups. • Projects – Review existing and planned IT projects and make determinations for what should continue, be paused or stopped. • Academic Computing <ul style="list-style-type: none"> ○ Institutional Media Design • End Point Devices • Residents Halls <p>Information Systems:</p> <ul style="list-style-type: none"> • Review business process vision and objectives from the other Working Groups for the full student life cycle including a core student information system for • Recruitment & Admissions • Catalog, Schedules, Registration • Financial Aid &* Billing 	<p>Priority 1 Questions Due December 4th:</p> <ul style="list-style-type: none"> • To successfully launch the combined University by August 2022, identify all mission critical applications/functionality including but not limited to recruitment, admissions, registration, grades, transcripts, course selection, housing, billing, etc. for current students and new student to successfully attend the new university in August 2022. • Questions: Conduct an evaluation of the following three options to move forward including a recommendation with a high-level risk/benefit. Include a high-level timeline, resources and cost estimate for Option 1 and 2. <ul style="list-style-type: none"> ○ Option 1 – Interim Systems Migration - Analysis of the most robust system(s) currently available within the 3 universities; Recommendation of one of the three platforms to serve a regional, interim solution for launching the new university in 2022. ○ Option 2 – Interim Workarounds Until OneSIS Migration - Analysis of the current migration path based on the OneSIS RFP and interim work effort required during the transition year of 2022/23 until the future OneSIS is implemented for the 2023 school year for the Cohort 1. ○ Option 3 – OneSIS Fast Track - Analysis of the ability to fast track the OneSIS implementation for an August 2022 launch based on the current procurement timeframe. • The working assumption is that OneSIS project will continue forward. Based on the approved recommendation, the implementation path for the vendor may be required to change. <p>Priority 1 Considerations – Critical Path (What design assumptions must be determined for the combined function/one University?)</p> <ul style="list-style-type: none"> • What are the expectations of the student, faculty and staff experience on Day 1? (For Information Systems, Infrastructure, General Tech Support, Instructional Tech Support) • What key milestones must be achieved to align with the academic year? • How should the work be sequenced to ensure a smooth transition? • What pre-requisites are necessary to complete the workgroup’s recommendations? • Will existing IT contracts need to be amended to align with the recommended approach? • What recommendations would the work group make to modify the existing identity management approaches? • Which projects would the work group recommend continue, stopping or pausing? • What is the recommended future state architecture (visual diagram) for the critical applications that must be standardized on by August 2022?



	High-Level Areas of Consideration	Questions to Inform Recommendations
	<ul style="list-style-type: none"> • Grading, Degree Audit <p>Systems to support:</p> <ul style="list-style-type: none"> • Supplemental financial services (payment processors, enhanced financial aid communications, scholarships, etc.) • New University Web Site • Student Life Systems (Housing, Dining, ID Card, Student Organizations, Career Services, Judicial, Health Center etc.) • Learning Management Systems • Other systems (placement testing, student employment, parking, faculty evaluations) <p>Infrastructure to support identity and management</p> <ul style="list-style-type: none"> • Identify information system solutions to support those processes including gap analysis of current state vs. desired state for X. • Short-term (August '21 processes supporting enrollment for Summer/Fall 2022) • Long-term (aligned with OneSIS, August '22 supporting enrollment for Summer/Fall 2023) <ul style="list-style-type: none"> ○ Data Networks (including VPN) ○ Voice Services ○ Communications Infrastructure (E-mail, Microsoft 365, Zoom, etc.) ○ Servers & Storage (local and cloud) ○ End User Devices (including VDI) ○ Security • General Tech Support Services – Review general technology support services and define optimal Help Desk Services for the combined institution <ul style="list-style-type: none"> ○ General IT support services (access, software, etc.) ○ IT field support (install, maintain, repair, etc.) • Instructional Tech Support Services - Review instructional technology support services and define optimal model for the combined institution <ul style="list-style-type: none"> ○ Instructional Design services ○ Classrooms and related instructional technology spaces (simulation labs, studios, etc.) ○ Computer Labs (general & specialized, physical & virtual) • Projects – Review existing and planned IT projects and make determinations for what should continue, be paused or stopped. 	<ul style="list-style-type: none"> • What estimated efficiency or service quality gains (or losses) may emerge from these recommendations? <p>Note: For the purposes of documenting implementation activities, the workgroup should assume that activities to meet the milestone dates above may need to begin in advance of July 2021 (Board affirmation).</p>