

Memo from the IST Transition Team:

The following project proposal was approved by the IST Directors on 02/28/07.

The estimated time commitment for DS-CPA-CS staff is approximately 40 – 60 hours. The estimated time commitment for all other team members is approximately 10 hours.

IST Transition Team work Group Project

General Information			
Proposed Project Name:	Web-based Team Workspace/Collaborative Suite (Phase 2a of 3)	Date:	February 15, 2007
Unit:	Data Services – CPA – Collaboration Services	Modification Date:	
Prepared by:	Ian Crew, Aron Roberts, Rick Jaffe	Authorized by:	

Description of Proposed Project

Scope and Objectives

To perform phase two of a project whose overall goal is to select a team collaboration suite (a web-based set of tools that inter- and intra-departmental teams within IST can use as they perform collaborative work on projects). Its goal is not to replace project management tools such as Microsoft Project.

In the phase one proposal for this project, we envisioned a second phase that would select and propose the method of implementation for a single (or small number of) these suites.

At the request of our sponsor, David Greenbaum, the pace of phase 2 of the project has been slowed down to allow time for the campus-wide collaborative tools research project to take its course. This campus-wide effort is exploring partnerships with Google, Yahoo, and Microsoft to deliver services including email, calendaring, and web file storage. The services provided in some possible scenarios include team collaboration suite-like tools similar to the ones being evaluated in the IST collaborative tools project. Therefore, the IST project will proceed slowly, awaiting a clearer indication of the ecosystem in which the product(s) that it eventually recommends will operate.

Taking this scaling-back into account, we now propose the following project roadmap:

- Phase 1 (complete):
 - See http://ist.berkeley.edu/one-ist/projectproposals/Collaborative_Tool_Proposal.231.pdf for the project proposal
 - See http://oneist.berkeley.edu/data-services/2006/11/ist_collaborative_tools_report.html for the project report
 - See http://oneist.berkeley.edu/data-services/2006/12/slides_from_ist_collaborative.html for the project brown-bag presentation.
- Phase 2a (this proposal):
 - Refine the list of technical and licensing criteria developed in phase 1 into a list of critical “go/no-go” criteria.
 - Evaluate several leading candidates against these criteria to test the criteria for feasibility.
 - Publicize and solicit feedback on this list of “go/no-go” criteria from IST/OCIO staff.
- Phase 2b:
 - Develop further, weighted criteria for desired (but not necessarily required) features based on IST use cases and scenarios and consult with IST/OCIO staff to ensure that those criteria are correct.
 - Evaluate candidates against critical and desired features. The evaluation may potentially acquire product data via an RFI or RFP process.
 - Study potential models for providing ongoing user training and support for the selected team collaboration suite.
 - Study potential models for providing ongoing systems support for the selected team collaboration suite.
 - Recommend a suite and training and support models for IST.
- Phase 3:

- o Oversee implementation within IST of the suite and associated support model proposed in phase 2b.

Justification/Benefits

1. Teams within IST currently use a number of collaborative workspaces provided by team collaboration suites such as BearShare, bSpace, Basecamp, etc. Standardizing on a common suite is expected to:
 - Increase familiarity and productivity with the selected suite(s).
 - Increase ease of starting up cross-IST and cross-campus project teams.
 - Make it easier for IST management to oversee project teams and track the progress of projects across the organization.
 - Reduce overhead by having IST staff manage a single system or small number of collaborative environments rather than three or more.
 - Make it possible for IST staff members to check a single or small number of locations for information related to the projects they are working on.
 - Reduce or eliminate the need to manage multiple logins and passwords across tools.
 - Reduce training and support costs for IST staff.
2. With the experience gained implementing and using such tools within IST, we will be better prepared to assist future IST efforts to fulfill overall campus needs for collaborative tools

Specifically, this phase of the project will allow us to significantly narrow the number of potential solutions under consideration. In the next phase, we will formally evaluate and select a solution.

Assumptions/Constraints:

1. The tools we are researching will only provide collaborative workspaces. If a tool provides other capabilities, we will mention but not research those capabilities.
2. We assume that, given a successful conclusion to each phase of this project, there will be management support for performing the subsequent phases.

Risks

Known Risks to Project Success

Overall Project:

1. Failing to identify the critical requirements of IST staff, either by missing requirements or by not effectively prioritizing their requirements.
2. Becoming bogged down in sorting through the myriad attributes of the vast number of potential tools available on the market today.
3. The soon-to-be-appointed Deputy CIO for IST may have a different tool or tools that he or she wants us to use for this purpose.
4. Failing to achieve reasonably enthusiastic buy-in for the recommended tool from IST staff.
5. Failing to select a tool that allows us to migrate from (or, if necessary, interoperate with) currently-used collaborative work space tools (such as BearShare, bSpace, Basecamp)
6. Selecting a tool that can't be implemented quickly due to funding constraints or licensing issues.
7. Selecting a tool that can't be brought up and running quickly, either on a hosted service or on a service administered by IST staff.
8. Selecting a tool that doesn't implement one or more key customer requirements.
9. Selecting a tool that has a steep learning curve or other serious usability impediments to adoption.

This phase:

The single major risk for this phase is that there is the potential to develop incorrect "killer" criteria that eliminate a tool that is in fact suitable for consideration.

Resource Needs (space, staff, budget, etc.)

Resources Required

One representative from each IST department to be a part

Special Resource/Skill Needs

Experience with project or team

of the project team. Access to tools being evaluated, which may in a few cases require short-term software licenses or subscriptions.	leadership Experience with the tools currently in use in IST				
Estimated Cost \$0-\$1000 in addition to staff time	Estimated Start Date: 2/22/2007 Estimated End Date: 4/30/2007				
Project Approach					
Activity Description					
<ul style="list-style-type: none"> Using the information gathered during phase 1 of the project, develop a short list of criteria that can easily be used to objectively decide whether or not a given collaborative tools product should receive further consideration as a potential solution for IST's use. Evaluate several potential solutions against these criteria to evaluate whether the criteria are valid and result in a viable set of tools to be evaluated in later phases. Revise the criteria as necessary to achieve this result. 					
Participant Roles					
Name	Project Manager	Sponsor	Project Team	User/Client	Stakeholder
(Note: As everyone in IST is a potential or likely user of this system, we have excluded that column from the list of participants below)					
David Greenbaum		X			X
Ian Crew	X				X
Aron Roberts			X		X
Rick Jaffe			X		X
Representative from Client Services with project or team leadership experience (Kevin Haney and Gary Thackeray)			X		X
Representative from Infrastructure Services with project or team leadership experience (Jeff McCullough)			X		X
Representative from Application Services with project or team leadership experience (likely Randy Ballew)			X		X
Representative from CIO's Office with project or team leadership experience (Allison Bloodworth)			X		X