# Project Description/Issue Statement (may include project triggers):

Deploy Zoom to replace the existing video and web conferencing tool, Webex**.** The desired deployment date is the end of May 2019 for general use. The Zoom contract cost will carry into subsequent years. Costs may increase with if OSU decides to increase capacity of ad-on services, which include Zoom Rooms, Zoom Webinar or Zoom Large Meeting.

Triggers for this change include:

OSU's contract with Webex expires on July 31 2019, prompting a request for proposals and evaluation of video conferencing and web collaboration solutions.

Zoom outperformed Webex in both the customer and technical evaluations.

Adopting Zoom allows OSU to move away from the video conferencing bridge infrastructure.

# Goals & Objectives:

## Strategic Goal(s) Supported

Technology that just works.

## Business Objectives

Simplify video and web conferencing by deploying a tool known for its ease-of-use. Increase utilization of video and web conferencing by reducing technical difficulties.

## IT Objectives

# Project Governance

|  |  |
| --- | --- |
| Role | Name/Org |
| Project Sponsor | Andrew Wheeler, Client Services |
| Project Manager | Carolyn Rothwell, Client Services |

# Project Scope:

|  |  |  |
| --- | --- | --- |
| Scope | In | Out |
| Functional | Online meetings, 100 person capacity. Webinars, 100 and 500 capacity, limited licenses assigned by request. Audio conferencing.Cloud video conferencing.  | Online meetings with capacity over 100. Webinar service for all users, webinar services with capacity over 500.Segmented service for training center, support center (functionality available via online meetings). |
| Organizational | Current OSU faculty, staff and students. | Associates. |
| System | Integration with SSO and provisioning services.Calendar integration with Exchange  |  |
| All other Scope*Desired feature to improve video conferencing experience using standards-based room systems.* | Zoom One-Touch Connector, allows a scheduled Zoom meeting to be started directly from the room system with a push of a button.Supported Systems:Cisco- SX Series- MX Series- DX Series- Tandberg C Series - Tandberg EX SeriesPolycom- Group Series- Debut- HDX- Trio | Room systems that are not supported by Zoom One-Tap-Connector. |

# Flexibility Matrix:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Least Flexible | Moderately Flexible | Most Flexible |
| Scope | X |  |  |
| Schedule |  | X |  |
| Resources |  |  | X |

# Key Project Deliverables

Contract with Zoom as OSU’s video and web conferencing service tool.

Implement and configure tool for deployment.

Create and publish website/portal page for tool.

Develop training, support and documentation for using the tool.

Develop communication plan.

Deploy tool.

Implement communication plan.

Implement calendar service with Exchange to support calendar resources for Room Systems.

Provide training on general use and room systems.

Facilitate transition to new tool.

Retire Webex.

# *Preliminary* Schedule and Milestones:

|  |  |
| --- | --- |
| Milestone | Date (mm/yy) |
| Contract with Zoom | 05/01/19 |
| Pre-Launch Communications  |  |
| IT Pros/ITCC/RFP Evaluation Group | 05/01/19 |
| Faculty and Staff | 05/13/19 |
| Deployment Implementation |  |
|  Tool Configuration | 05/14/19 |
|  SSO  | 05/20/19 |
|  Provisioning | 05/20/19 |
|  Kaltura | 05/20/19 |
| Pre-Deployment Testing | 05/21/19 |
| Portal Page with Supporting Resources | 05/23/19 |
| Deployment  | 05/23/19 |
| Launch Communications | 05/27/19 |
| Training  |  |
| Campus Wide Provided by Zoom | 05/30 (TBD) |
| Small group or 1-1  | On going |
| Enhanced Implementation (Room Systems) |  |
|  Exchange Calendaring | 6/17/19 |
|  One Touch Connector  | 6/17/19 |
| Transition Communications and Facilitation  | 06/03/19-7/31/19 |
| Webex Retirement | 7/31/19 |

# Staffing Estimates

|  |  |  |
| --- | --- | --- |
| Role | Effort | Name/Org |
| Sponsor | 10% | Andrew Wheeler/UIT |
| Project Team Lead / Product Manager | 60% | Carolyn Rothwell/UIT |
| Project Team Member | 65% | Lawrence Eng/UIT |
| Project Team Member | 65% | Ryan Fordham/UIT |
| Infra. Svcs Representative | 10% | Marjorie McLagan/UIT |
| Identity and Access Mgt Representatives | 10% | Andy Morgan/UITJason Peak/UITErica Lomax/UIT (optional) |
| Acad. Tech. Representatives | 25% | Marc Cholewczynski/UITKristina Case/UITRaul Burriel/UIT |
| Client Services CNRepresentative | 35% | Ben Shields/UIT |
| OSU Extension Service Representative | 10% | Lucas Turpin/Outreach and Engagement & College of Agricultural Sciences |

# Service

|  |  |
| --- | --- |
| Item | Name/Org |
| Owner (when project completes) | Andrew Wheeler/UIT |

# Financial Estimate (opt.)

|  |  |
| --- | --- |
| Total Costs | Dollars |
| Initial Cost of Project | On file with Procurement and Contract Services |
| Ongoing Annual Cost |   |
| Total Benefits | Dollars |
| One-time Savings |  |
| Annual Savings | Estimated $27,00 current annual spend on Zoom Pro licenses by OSU community members |

## Funding Source

Initial Costs: IS central software budget

Ongoing Costs: IS central software budget

## Benefit Description (e.g. revenue increase)

There are 175+ individual Zoom Pro licenses paid by OSU community members, at an estimated cost of $27,000.

There are additional cost savings associated with replacing standards-based rooms with Zoom Rooms. Equipping Zoom Rooms offers savings over equipping traditional standards-based rooms.

# Dependencies, Assumptions and Constraints

Integration dependencies.

Resource constraint due to overlapping projects.

Schedule constraints related to existing tool, Webex, set to expire July 31 2019.

# Project Performance Measures (opt)

Increase in number of meetings held through new tool Zoom, reduced meetings held in existing tool Webex.

# Known Issues and Risks (of proposal)

Compressed timeframe to implement new tool, Zoom, transition, and retire prior tool, Webex.

Additional transition timeframe constraints due to 9 month faculty schedule, effectively shorting transition time to end of spring term, June 14th for this group.

Costs associated with learning, training and migrating to a new tool.

Users of existing tool may struggle to embrace move to new tool.

We fail to obtain sufficient buy-in from staff or customers.

General note…doesn’t have to be just one page.

1. Project Description/Issue Statement
Summarize the project and business problems to be solved.
2. Goals & Objectives
Describe the major goals and objectives of the project from both a business perspective and an IT perspective, if relevant. [Note: clarify language that business objectives should be in terms of capabilities needed – not assets/IT language, etc]
3. Project Governance

List the individuals assigned in directing the project

1. Project Scope
Describe what is in and out of scope from a functional (boundaries around what the solution does), organizational (who is affected) and systems (which systems or infrastructure is involved) perspective.
2. Flexibility Matrix
Assess where the flexibility will reside for the project to react to uncertainty as the portfolio is created. The assessment is relative between the three factors.
3. Key Project Deliverables
List deliverables for the project in terms of business and process capabilities rather than *in terms of changes to particular applications/assets*.
4. Preliminary Schedule and Milestones
List the anticipated start and end dates of the project. Include dates of required interim milestones as appropriate.
5. Staffing estimates
List the estimated roles and % FTE required to complete the project (e.g 50% DBA, 10% web programmer).
6. Service
Enter the proposed long-term owner of the delivered solution when the project completes.
7. Financial Estimate (summary of cost-benefit analysis)

Under Total Costs, list the expected cost to deploy the project (include software, hardware, vendor costs, training, travel, marketing, etc.). List the expected annual cost to maintain the delivered solution (include maintenance fees, service costs, renewals, additional staffing, etc.)

Under Total Benefits, list the expected income or recovery costs (people, hardware, software renewals, additional fees, etc.)

Under Funding source, list the index/account, grant name or organization to provide funding

1. Dependencies, Assumptions, and Constraints
List related project deliverables, important assumptions made, and imposed constraints. Note if the project's benefits are dependent on other project delivery dates, business projects/events or seasonal trends (e.g., in time for back-to-school).
2. Issues and Risks
Document any anticipated issues and risks with the project that should be considered during portfolio planning.