PROJECT CHARTER

1. General Project Information

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>Institutional Research (IR) Repositioning for FY2022: Cross-Campus Workgroup</th>
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<tbody>
<tr>
<td>Executive Sponsor:</td>
<td>Tammi Chun, AVP UHCC</td>
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<tr>
<td>Project Manager:</td>
<td>Joshua Kaakua, UHCC</td>
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<td>Impact of project:</td>
<td>Institutional Research provides timely and reliable information and analysis to support the organization’s mission, decision-making, and institutional effectiveness. This workgroup is tasked to provide recommendation to potential centralization, consolidation, and/or re-organization of UH IR resources and functions.</td>
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2. Project Team: IR Redesign

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<tr>
<th>Campus</th>
<th>Name</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Workgroup</td>
<td>UHCC</td>
<td>Joshua Kaakua</td>
</tr>
<tr>
<td></td>
<td>Windward</td>
<td>Ardis Eschenberg</td>
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<tr>
<td></td>
<td>Hawai‘i</td>
<td>Mary Washington</td>
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<td></td>
<td>Honolulu</td>
<td>Steve Shigemoto</td>
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<tr>
<td></td>
<td>Kapiolani</td>
<td>Kara Plamann Wagoner</td>
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<td></td>
<td>Kauai</td>
<td>Amanda Fluharty</td>
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<tr>
<td></td>
<td>Leeward</td>
<td>Jayne Bopp</td>
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<tr>
<td></td>
<td>Maui</td>
<td>Jeannie Pezzoli</td>
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<tr>
<td></td>
<td>Windward</td>
<td>Jeff Hunt</td>
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3. Stakeholders (e.g., those with a significant interest in or who will be significantly affected by this project)

- Institutional Research Offices: Institutional Analysts, IT Specialists, Planning and Assessment offices;
- Campus grants development
- Data users, Campus faculty, Administrators

4. Project Scope Statement

**Project Purpose** Describe the need this project addresses: What problem is being addressed?

This workgroup is chartered to respond directly to the broader organizational and resource planning challenges identified in the VPCC 10/12/20 memo. Institutional Research (IR) has been identified as a functional group to propose ideas for consideration towards potential re-organization and possible consolidation.

Currently, each UHCC campus maintains an institutional research office. Campus level research functions and system level functions occur at different levels with different focus. A proposed
organization is that each campus would have a lead point of contact for specific campus data needs while allowing IR staff to build a strong data driven strategy to assist campuses.

**Objectives** Describe the measurable outcomes of the project: What are we trying to achieve?

1. Recommendations are sought to inform and guide reimagining UHCC IR resources;
2. Proposed visions, advantages, and disadvantages for potential models of UHCC centralization, consolidation, and re-organization of IR resources across UHCCs;
3. More efficient operations, improved management and output;
4. Reduction of duplication and redundancy and improvement of service delivery.

**Deliverables** What result or delivery is expected?

1. Memo of recommendations to VPCC by November 9, 2020 to inform the CC plan for the BOR December 2020 meeting;
2. System governance and discussion group through March 2021.

**Scope** List what the project will and will not address

This project will address:
- Exploration of potential models of centralization/consolidation, and/or collaboration across UHCC;
- Inventory of the current IR functions by campus and System;
- Inventory of the current IR resources by campus and System;
- Projected campus needs and demands related to IR;
- Articulation of a vision for Institutional Research at the UH Community Colleges;
- Development of a proposal of UHCC IR that fulfills campus/system needs and strategy;

This project will not address:
- Institutional Research needs and/or capacity at UH four-year universities;
- Review of individual employees;
- Project may recommend funding sources for cost items associated with recommendations but is not responsible for securing funds;

**Project Milestones** Propose start and end dates for Project Phases (e.g., Inception, Planning, Construction, Delivery) and other major milestones

**Inception/Planning:** Oct 2020
- Review and Approval project charter
- Establish workgroup (representatives for each campus and system)
- IR open survey design, review, and collection
- Communicate purpose and timeline on workgroup with key stakeholders

**Delivery:** Nov 9. 2020
- Memo from workgroup to VPCC with recommendations and comment re: UHCC IR proposal for centralized or consolidated design;

**Ongoing through Mar. 2021**
- Advisory, feedback, and communication activities in support of UHCC repositioning discussions
### Potential Obstacles: including significant Assumptions

What could prevent or hinder our success in achieving our goals? Which of these potential obstacles can we mitigate early on and how? Which should we monitor on a regular basis and who will be responsible for monitoring?

Timeline: Significantly quicker than what has been common in UH procedures;
Unknowns: Best recommendations and planning for UHCC IR will be challenged if other aspects of the UHCC environment are forecasted to change including: repositioning of academic programs; extent of budget restrictions; UHCC interventions to address budget shortfalls, actual Resistance, reluctance, and fear of change (or impacts of change);
Nature of consolidation conversation is nuanced, challenging, and may be difficult to derive a “best” objective model;
Evaluation of units vs. personnel may lead to decision-making without targeting the real issues.

### Constraints

List any conditions that may limit the project team’s options with respect to resources, personnel, or schedule (e.g., predetermined budget or project end date, limit on number of staff that may be assigned to the project).

### External Dependencies

Will project success depend on coordination of efforts between the project team and one or more other individuals or groups? Has everyone involved agreed to this interaction?

None

### 5. Communication Strategy

**(specify how the project manager will communicate to the UHCC Sponsor, Project Team members and Stakeholders, e.g., frequency of status reports, frequency of Project Team meetings, etc.**

Project Manager will maintain record communications via email, meetings via Zoom, and repository of meeting minutes and resources via shared workgroup google drive. Project manager will communicate with UHCC sponsor (Tammi and Erika as needed).
Chancellor lead will brief Chancellor's group as needed.

### 6. Sign-off

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<thead>
<tr>
<th>Name</th>
<th>Signature</th>
<th>Date (MM/DD/YYYY)</th>
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<tbody>
<tr>
<td>UHCC Sponsor</td>
<td>Tammi Oyadomari-Chun</td>
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### 7. Notes

- Inventory of IR functions;
- Articulation of Vision for IR
- IR Workgroup resources, relevant documents, and working and final materials will be held in the “IR Redesign Workgroup 11_2020” shared drive accessible to all UHCC IR staff with access to the general IR Cadre materials.