

**Marshall University
Vision 20/20 Implementation Plan
Approach Document**

Background:

From May to September 2014, six rapid response teams (RRTs) worked on identifying and refining net revenue enhancement (NRE) opportunities for the University. A total of approximately \$10 million was ultimately identified by the RRTs, and accepted by the President for implementation. These recommendations are summarized in Table 1, below. The University is now ready to launch its implementation of these recommendations.

Project Goals:

The implementation planning and execution of the Vision 20/20 Action Plan focuses on generating \$ 7-10 million in NRE in FY 2016 to:

- Cover the \$5.8 MM in one-time monies used to balance the FY 2015 budget, and;
- Fund another year of the staff raises awarded in October 2014.

Table 1- Summary of Opportunities Identified by the Rapid Response Teams

Marshall University								
Administrative Services Review								
Net Impact Summary - August 28, 2014								
Subgroup	Target	Net Impact to Date	Savings			Total Savings	Net Revenue Enhancement	Investment Required
			Personnel	Operating	Capital			
Duplication of Efforts	\$ 2,730,000	\$ 3,257,282	\$ 1,579,871	\$ 643,161	\$ -	\$ 2,223,032	\$ 1,440,000	\$ 405,750
Leveraging Technology	\$ 1,360,000	\$ 1,488,424	\$ 860,000	\$ 284,922	\$ 188,333	\$ 1,333,255	\$ 360,169	\$ 205,000
Facilities	\$ 1,360,000	\$ 2,208,597	\$ -	\$ 1,282,297	\$ 950,000	\$ 2,232,297	\$ 99,150	\$ 122,850
Auxiliaries (Phase 1)	\$ 1,820,000	\$ 1,776,746	\$ 2,128,046	\$ 116,700	\$ -	\$ 2,244,746	\$ 32,000	\$ 500,000
Pcard and Travel	\$ 450,000	\$ 448,780	\$ 280,000	\$ 273,780	\$ -	\$ 553,780	\$ -	\$ 105,000
Vendors and Contracts	\$ 2,270,000	\$ 929,000	\$ -	\$ 909,000	\$ -	\$ 909,000	\$ 100,000	\$ 80,000
TOTAL	\$ 9,990,000	\$ 10,108,829	\$4,847,917	\$ 3,509,860	\$ 1,138,333	\$9,496,110	\$ 2,031,319	\$ 1,418,600

Structure:

The overall effort will be led by the Steering Committee: John Maher (Chair), Layton Cottrill, Jan Fox, Mike Hamrick, Mary Ellen Heuton, Brandi Jacobs-Jones, Gayle Ormiston, Buffy Hammers, and Ginny Painter. Seven rapid response teams will report to the Steering Committee.

Table 2 reflects the structure of each of the implementation teams and corresponding recommendations and targets. Each team has been assigned a lead and additional members as deemed appropriate to facilitate the implementation of the recommendations. Team leaders and members are listed in the accompanying charges in Appendix A.

Table 2- Teams for Implementation of Service Portfolio Recommendations

Team	Opportunities	Net Revenue
Academic	Restart continuing education Increasing distance learning courses - revenue enhancement E-Course funding model & development	\$1,655,169
Auxiliaries and Facilities	Evaluate outsource housekeeping/grounds; Review Auxiliary positions; Sell University Heights property Combine summer/evening classroom bldgs.; Upgrade lighting fixtures (T5s and LED); Hire Mechanical engineer (building efficiency/infrastructure audit); Hire Digital Control Specialist -Environmental controls; Establish energy policy; Improve space utilization; Close underutilized bldg/areas; Staggering maintenance shifts	\$3,659,790
IT, Printing and Faxing	Consolidated IT Staff within IT division Eliminate desktop printers; move to network printers Eliminate shadow systems/ licenses Coordinate IT support positions across campus Upgrade video multiplexing controller Videoconferencing - Lync	\$ 709,187
P Card, Procurement and Travel	Consolidate printer and copiers under managed contract Expand use of My Buy New Pcard reconciliation process Termination of expiring leases External travel agency & related policies and procedures Rebid suppliers of cable services Reduce memberships	\$1,153,780
Administration and Finance	Training requirements/efficiency Business Center Model- Admin Services Reduce MURC payroll surcharge Eliminate student insurance Enhance grant administration processes	\$1,330,528
Library	Consolidate Library Services (HSL/MUGC)	\$ 312,938
Marketing, PR and Web	Outsource selected Printing Services Consolidate marketing and public relations functions University website - in house and hosted by University Licensing affiliate- increase revenue from trademarks	\$ 367,417

Total		\$ 9,188,809
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Process:

The Steering Committee and team leads would be scheduled to meet biweekly during this project, with rpkGROUP participating via conference call or video conferencing. Conference calls will include the subgroup leads, but time will be allocated on each call with just the Steering Committee.

Team leads will establish a meeting schedule for their respective team. Each team will be responsible for:

- Familiarizing itself with the RRT recommendations and the assumptions that underlie them. This information is contained in the “Consolidated RRT Tracking Matrix” spreadsheet and materials produced by each team. The recommendations that are slated for implementation are identified in the charter for each team, and referenced to more detailed information from the RRT team that developed them. The members of the relevant RRT teams should be used as resources.
- Developing a plan for the implementation of the recommendations, consistent with delivery of NRE in FY2016.
- Developing sub-teams and associated charters in concert with the steering team as required for implementation.
- Developing metrics for monitoring implementation progress and effectiveness.

Schedule:

This project would be scheduled for completion in approximately 180 days, from January – June 2015.

Critical milestone dates/timeframes would be:

- Mid-December, 2014: Project Planning with Team Leads and Steering Committee
- January 20, 2015: Implementation Kick Off – All Teams and Members
- Late-March 2015 (Project midpoint): Final NRE and implementation plans due
- Mid- April: Initiation of implementation and monitoring of NRE
- End of June (Project endpoint): Campus Leadership Retreat

Appendix A - Team Charges

As part of their charge, all teams should ultimately produce a prioritized list of recommended initiatives. Each initiative would include the following:

1. Projected savings/net revenue
2. Organization structure impacts and recommendations
3. Job descriptions and salary levels for new or reconfigured positions
4. rfp documents, as appropriate
5. Necessary operating and capital investments
6. Performance metrics
7. Communication plan
8. Timeline for implementation, with major milestones

Team 1: Academic

Review opportunities to drive net revenue through mission/market/margin opportunities in continuing education and ecourse/online. Review and recommendations to include:

- Organizational structure for ownership, delivery and oversight of these programs
- Analysis of pricing structures given market demand and competition
- Analysis of cost and net revenue
- Consideration of reward/revenue share structures
- Identification of program focus areas based on market demand, workforce shortage, etc.
- Timeline for program delivery

A-Continuing Education

Team Lead: Teresa Eagle (t.eagle@marshall.edu)

Steering Team Liaison: Gayle Ormiston (Ormiston@marshall.edu)

Team Members: Mike Prewitt, Andrew Gooding, Monica Brooks , Glenn Anderson, Dan Holbrook, Tammy Johnson, Bonnie M. Prisk, Erika Riley, Marcia Harrison-Pitaniello, Homer Preece, Denise Hogsett

B-e-Course/Online Education

Team Lead: Karen McComas (mccomas@marshall.edu)

Steering Team Liaison: Gayle Ormiston (Ormiston@marshall.edu)

Team Members: David Pittenger , Monica Brooks , Cam Brammer, RB Bookwalter, Teresa Eagle, Elizabeth E. Hanrahan, Mark Robinson, Steve Hensley, Brian M Morgan, Tracy Christofero

Opportunities for Implementation

RRT Team	Rec #	Opportunity	NRE
Leveraging Tech	20	Restart continuing education	\$ 65,000
Leveraging Tech	17	Increasing distance learning courses - revenue enhancement	\$ 90,169
Dup of Effort	16	E-Course funding model & development	\$ 1,500,000
			\$ 1,655,169

Team 2: Auxiliaries, Facilities and Leases

- Develop implementation plan for lighting capital investment, including roll plan across campus to maximize savings and service levels
- Evaluate cost savings and service impacts from outsourcing opportunities, prioritize these opportunities and develop rfp documents as appropriate
- Obtain market analysis for sale of university assets (e.g. University Heights)
- Establish priorities for space utilization improvement opportunities, based upon maximization of savings and maintenance/increase in customer service and satisfaction for both internal and external customers
- Assess ROI from new position hires and establish hiring prioritization, job descriptions, and salary levels
- Develop University energy policy

Team Lead: Karla Murphy (murphy72@marshall.edu)

Steering Team Liaison: Brandi Jacobs-Jones (jacobs2@marshall.edu)

Team Members: Scott Morehouse, Allen Taylor, R Scott Anderson, Sonja Cantrell, Marty Newman, Margie Phillips, William "Tootie" Carter, Andrew Darling, Charlann McKenna, Joyce Harrah

Opportunities for Implementation:

Auxiliaries

Auxiliaries	3	Evaluate outsource housekeeping/grounds	\$ 1,422,046
Auxiliaries	16	Review Auxiliary positions	\$ 200,000
			\$ 1,622,046

Facilities and Leases

Facilities	20	Sell University Heights property	\$ 950,000
Facilities	3	Combine summer/evening classroom bldgs	\$ 263,008
Facilities	15	Upgrade lighting fixtures (T5s and LED)	\$ 233,387
Facilities	5	Hire Mechanical engineer (building efficiency/infrastructure audit)	\$ 209,672
Facilities	4	Hire Digital Control Specialist -Environmental controls	\$ 190,495
Facilities	23	Establish energy policy	\$ 79,695
Leveraging Tech	1,2	Improve space utilization	\$ 56,568
Facilities	7,22	Close underutilized bldg/areas	\$ 30,669
Facilities	19	Staggering maintenance shifts	\$ 24,250
			\$ 2,037,744

Team 3: Administration and Finance

- Create professional development plan to allow for maximization in utilization of existing technology
- Develop shared service model(s), including organization structure changes, job descriptions, training needs, necessary operating and capital investments and projected savings and efficiencies
- Assess MURC payroll surcharge
- Develop action plan for elimination of unnecessary student insurance

Team Lead: Tim Weingart (weingartt@marshall.edu)

Steering Team Liaison: Layton Cottrill (cottrill@marshall.edu)

Team Members: Miriah Young, Nancy Tresch-Reneau, Bruce Felder, Marty Laubach, Carol Hurula, Nina L Barrett, David Steele, John Yaun, Mark Cutlip, Yetta Meadows

Opportunities for Implementation:

Admin and Finance

Leveraging Tech	12	Training requirements/efficiency	\$ 650,000
Dup of Effort	1	Business Center Model- Admin Services	\$ 436,000
Vendors/Contracts	9	Reduce MURC payroll surcharge	\$ 100,000
Auxiliaries	1	Eliminate student insurance	\$ 115,500
Dup of Effort	10	Enhance grant administration processes	\$ 29,028
			\$ 1,330,528

Team 4: Printing Faxing and IT

- Create an implementation plan for IT staff consolidation and coordination, including impacts to organization structure, job descriptions, necessary operating or capital investments, and timeline and milestone dates
- Create an implementation plan for transition to networked printing campus wide
- Develop assessment and implementation plan for addressing savings opportunities regarding shadow systems and licensing
- Develop action plans for recommended IT investment, including an assessment of ROI from those investments

Team Lead: John Cutler (jon.cutler@marshall.edu)

Steering Team Liaison: Jan Fox (fox@marshall.edu)

Team Members: Alice Roberts, Juanita Parsons, Teresa Holschuh, Paula Kaplan, Chris Atkinsm, Amad Mirzakhani, Holly Simpkins

Opportunities for Implementation:

Print Fax and IT

Dup of Effort	2	Consolidated IT Staff within IT division	\$ 366,000
Leveraging Tech	5	Eliminate desktop printers; move to network printers	\$ 150,000
Leveraging Tech	5,6,8,9,10	Eliminate shadow systems/ licenses	\$ 81,500
Lev Tech	14	Coordinate IT support positions across campus	\$ 60,000
Leveraging Tech	8	Upgrade video multi-plexing controller	\$ 33,333
Leveraging Tech	22	Videoconferencing - Lync	\$ 18,354
			\$ 709,187

Team 5: Library

- Develop implementation plan for consolidation of library services, including:
 - Projected savings/net revenue
 - Organization structure impacts and recommendations
 - Job descriptions for new or reconfigured positions
 - Necessary operating and capital investments
 - Performance metrics
 - Timeline for implementation, with major milestones

Team Lead: Penny Kroll (kroll@gmail.com)

Steering Team Liaison: Gayle Ormiston (Ormiston@marshall.edu)

Team Members: Michael McGuffey, Noah Lamb, Stephen Tipler, Patricia Gallagher, Virginia Campbell-Turner, Mike McCarthy, Jody Perry

Opportunities for Implementation:

Dup of Effort	6	Consolidate Library Services (HSL/MUGC)	\$ 312,938
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Team 6: Marketing, PR and Web

- Evaluate cost savings and service impacts from outsourcing opportunities, prioritize these opportunities and develop rfp documents as appropriate
- Create an implementation plan for staff consolidation, including impacts to organization structure, job descriptions, necessary operating or capital investments, and timeline and milestone dates
- Develop transition plan to move University website in house
- Create action plan for increasing revenue from trademarked items, including projection of net revenue

Team Lead: Matt Hayes (hayes2@marshall.edu)

Steering Team Liaison: Ginny Painter (painterv@marshall.edu)

Team Members: Matt James, Shane Tomblin, Jeff O'Malley, Deanna Mader, Megan Archer, Kathy Bialk, Leah Payne, Beth Wolfe, John Winters

Opportunities for Implementation:

Dup of Effort	3	Outsource selected Printing Services	\$ 148,417
Dup of Effort	4	Consolidate marketing and public relations functions	\$ 139,000
Leveraging Tech	25,27	University website - in house and hosted by University	\$ 40,000
Dup of Effort	11	Licensing affiliate- increase revenue from trademarks	\$ 40,000
			\$ 367,417

Team 7: P-Card, Procurement and Travel

- Develop action plan for consolidation of print/copy
- Develop action plan to support expansion of My Buy, including identification of departments for initial focus
- Create rfps for bid of identified services and commodities
- Create new policy and procedure to support changes in Pcard, as well as roll out and training plan
- Review expiring leases, and develop alternatives for space allocation for those that would not be renewed
- Review current memberships University wide and recommend opportunities for elimination

Team Lead: Denise Hogsett (hogsettd@marshall.edu)

Steering Team Liaison: Mary Ellen Heuton (heuton@marshall.edu)

Team, Members: Stephanie Smith, Karen Barker, Michael Castellani, Carolyn O'Lynn, Cammy Holley, Lisa Maynard, Teresa Bolt, Bob Dorado, Beth Hammers

Opportunities for Implementation:

Vendors/Contracts	2	Consolidate printer and copiers under managed contract	\$ 200,000
Vendors/Contracts	7	Expand use of My Buy	\$ 200,000
Pcards/Travel	3	New Pcard reconciliation process	\$ 175,780
Vendors/Contracts	3	Termination of expiring leases	\$ 155,000
Pcards/Travel	5	External travel agency & related policies and procedures	\$ 273,000
Vendors/Contracts	1	Rebid suppliers of cable services	\$ 100,000
Vendors/Contracts	4	Reduce memberships	\$ 50,000
			\$ 1,153,780