

# Business Plan Work Group

Business Plan Workgroup - Requirements Page ([click here](#))

**NOTE: See weekly agendas and meeting notes down this page**

The business plan work group are volunteers from the task force focused on the creation of the business plan and strategy for EdUnify. Anyone on the task force can sign up to participate. The group began a first set of weekly meetings between January 27 and ending February 17, 2010. We have added an additional set of weekly meetings that are on Tuesdays from 2-3 PM EST beginning March 3-23, 2010. Additional meetings beyond this will be scheduled as needed. The web conference connection information is:

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We've got to start meeting like this(TM)

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Please sign up below to participate. You may also just call in and observe or participate casually.

## Sign-up

Add your name here and we will add you to the business plan working group,

- Ed Hauser, SunGard Higher Education
- David Moldoff, AdadamyOne

## Current Assignments

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## Meeting Agendas & Notes

## Wednesday, January 27 Agenda

### EdUnify Business plan meeting agenda – 1/27/09

#### 1. Meeting Purpose and Objective:

Begin to outline the scope, assignments and timeframe for the creation and approval of the PESC EdUnify business plan. The business plan is to outline the business market, business requirements; cost structure and revenue for EdUnify. Potential list of assignments:

- Business Problem
- Business Requirements
- Sustainability of a Federated EdUnify
- Business Models
- Resource Requirements for Startup/Proof of Concept, Hosting/Virtualization
- Qualifications for Participating
- Fees and Rationale -Registration Services - Query Services - Agent Services
- Service level agreement
- Operational Requirements, what would we need to launch
- Adoption, Marketing, Alignment of Self Interests
- Overcoming Fear, Anxiety and Proprietary implications
- Staffing Plan by Phase

#### 2. Discuss the possibilities of the architectures from a business standpoint – Steve Wheat (5 minutes)

Question to discuss: - Will we have a governance team in place to govern the overall solution once this goes live?

#### 3. Discuss the cost structure and the business requirements for the EdUnify business plan (30 minutes)

##### *a. Revenue and expense model for PESC to sustain the registry.*

Expense examples: staffing; server cost, software licenses, server maintenance; registry software changes; network support; backup/recovery; security /authentication of registrars and users; help desk and support; documentations; marketing; conference attendance; consulting fees; legal fees; etc.

Revenue examples: EdUnify entity membership/subscription; fees for registering services; fees to use the lookup service; data services/reporting; consulting;

##### *b. Business requirements by entity.*

We need to start documenting the business problem EdUnify is solving along with the business requirements or the *¿what¿* that is need by each entity that will be involved in the registry.

Examples: PESC; software vendors; institutions; non-profit organizations; other?

Examples of some high level requirements:

- Provisioning and authentication
- Register a deployed web service
- Lookup a service
- Contact the provider of the service
- Create an EdUnify account
- Change my password
- Access documentation
- Pay for my EdUnify membership
- Get assistance from customer support
- Monitor the usage of a web service
- Comment and rating of web services
- Modify or upgrade one of my registered services
- Get upgrades for web services we utilize
- Need for professional services to help register my services

##### *c. Other aspects of the business case include the need to create the following:*

Qualifications for participating in EdUnify; Service level agreement; Strategy for adoption; EdUnify launch plan;

#### 4. Discuss time frame for completion and approval of the business plan (10 minutes)

For example, we will need to have draft reviews, and subsequently community reviews and ultimately PESC board approval

#### 5. Review of assignments and dates to complete (5 minutes)

#### 6. Questions/wrap up (5 minutes)

### Wednesday January 27 Meeting NOTES:

Outlined below are the notes and attendees from our EdUnify Business Plan Workgroup meeting of Wednesday January 27. Attendees included:

ShawnBay, eScholer

Leslie Kaufman – Decision Academic

Jason Zhong, SunGard Higher Education

Bill Hollowsky, SunGard Higher Education

Mark Bolembach, SunGard Higher Education

Steve Wheat, EmoryUniversity

Dave Moldoff, AcademyOne

Richard Moon, SunGard Higher Education

Ron Kleiman – SIF Association

Jeff Alderson, ConnectEDU

Chris Kaschmitter, Avow Systems

Nancy Smith NCES

The meeting focused on some discussion from Steve Wheat and he reiterated the potential approaches to the registry, e.g. central registry with internal controls, central registry with distributed control architecture, peer to peer. There are other possible options, however the business plan needs to define requirements in order to help the tech team determine the right approach. We created a new Business Plan Workgroup – requirements page on the wiki. This page is for the workgroup or anyone that would like to enter business requirements. We decided that we have to define requirement first – get them listed – then provide user stories behind the business requirements. We talked about two levels of requirements – one by entity, e.g. institutions, non profit or govt agencies, associations, software vendors and PESC. The other level was then users within those entities, i.e. IT staff, registrars within the entity, administrators, students, etc. We asked for Business Plan workgroup members to begin entry of business requirements on the wiki so we can begin discussion on them at our next meeting on February 3, 2010 at 2:00 PM EST (see wiki page for call details) Finally, we indicated we would like to have a draft of the business case ready for review by the spring PESC summit in April. I have posted these minutes on the wiki page as well. Please let me know if you have any questions and don't forget our next meeting is this Wednesday Feb. 3 at 2 PM EST.

[insert meeting notes here]

## **February 3, 2010 Agenda & Meeting NOTES:**

1. discuss business requirement - working discussion to begin documenting the business requirements
2. Discuss business model - an example will be posted to the WIKI that we can discuss on the call
3. Discuss need for any sub groups and assignments
4. Other?

### **ATTENDEES:**

Ed Hauser, SunGard Higher Education

David Siegfried, Smart Catlog

Jason Elwood, Red Lantern

ShawnBay, eScholer

Leslie Kaufman – Decision Academic

Jason Zhong, SunGard Higher Education

Steve Wheat, EmoryUniversity

Dave Moldoff, AcademyOne

Ron Kleiman – SIF Association

Jamie Chambron, SunGard Higher Education

Lots of discussion on the what that is needed for the registry and look-up services. Here are my mostly unedited notes. Feel free to add or edit as needed.

We decided to work on a matrix on the wiki that we could assign members to work on. The matrix would be a starting point for high level function – list what they can do. Dave Moldoff volunteered to take a stab at matrix for the wiki – then assign volunteers for each column. Shawn Bay offered to help Dave. Ron Kleiman – made a point that he thought we were boiling the ocean a bit – that we need to know what kind of services are needed in the registry and service – should it be specific to education? Stakeholders are specific to education – understanding a bit more as what service should be – here are some of the things the service has to provide – Steve – tech team - READ candidate tech design – and bibliography RSS feed – here is what people would post. Steve – organization are unable because no standard to publish and use web services – build from scratch with own data structures. If registered people can start seeing how and standards – need tools to see how pesc approved ontology.

Need a method to be able to easily publish and use published web services – needs to be easy – then we can get to Ron Kleiman's point on education specific services. Steve Wheat suggested a listing of "Killer apps" which would essentially give examples and what you can do with the registry and look-up. Steve recognized that we need the infrastructure to support the apps but the apps were to give examples of what was possible with EdUnify.

## February 17, 2010 Agenda & Meeting NOTES:

1. Review last discussion and status of any new work
2. Begin to outline the "what" that is needed by PESC/Edunify. Requirements by persona, e.g. PESC, Colleges, Software vendors, Non-profit agencies, Service providers, other?
3. Discuss need for any sub groups and assignments
4. Other?

### ATTENDEES:

Ed Hauser, SunGard Higher Education

Jason Elwood, Red Lantern

Leslie Kaufman – Decision Academic

Dave Moldoff, AcademyOne

Jim Wager, Script safe international

### Notes:

EdUnify - We are getting close to a proof of concept that won't be a huge development effort. Here is one open source project (one of several) the task force found and studied. It is 90% of what we need to start EdUnify. It has a simple business model – as an online marketplace – and lookup service that will have additional functions added to support program lookup.

<http://www.biocatalogue.org/>

Bio thing – partners Service categories on left – admission, bookstore, transcript ex Is this an electronic marketplace?

Jason How does pesc make money – marketing of info that is on the web service itself??? E.g. Google ad works Monetize the service??? Does provider pay for ?

Jim wager – practical would be service providers would be willing to pay???

Jason – academy one and red lantern have competing products – why haven't they done anything to make our products more easily used together??? This is fundamental issue – companies have to make it easier for companies to Jason – pilot with seed money??? Chicken and egg

Dave – market conditions will force us to adopt this type approach Options to providers? All build proprietary services? E.g. digital, Wang ibm pcs. Options to service providers: Publish is free Having certain elects within the blue box would be a set price – e.g. ratings, acceptability, performance quality, sort order could be a fee or not. Monetize content of the data is one approach.

Dave – legislation to fund companies to make changes to products –

Leslie – point of this group is not to build model but case to why we are trying to do this? Niche vendors need to convince erp vendors of why coming on board – haven't done this enough – business case to ourselves let alone anyone else as to what we are trying to accomplish?

Jim – just joined pesc – value that he sees of pesc is setting of standards that everyone can participate in – EdUnify sees as similar – set of standards that people can start to register services and they fit together then we have accomplished a good thing. E.g. sending and receiving electronic transcripts --lots of vendor doing it – point is from customer perspective we have developed a set of stovepipes –

Jason business case and story of how this helps??? – Altruistic reference – if we don't focus on getting buy in to who uses the services

Dave – have you looked at the outline – killer apps on top of infrastructure first page on web site it business case to the community – the what are we trying to do here?

Jason – if I need to go to my boss here is why we need to participate? Web page is not it Jason – example cost calculator of heoa – simple question – how much to finish my degree? Service required getting fairly immediate response – instead of days or weeks – anonymous of vendor –

Leslie – the story to tell and it is a compelling story that we need for the summit meeting - ??? What are we trying to accomplish with all of this? What is the value proposition???

Dave – need a high level business problem – to address the cost side of things – and lack of accessibility of exchange – maybe the government should drive it?

*Dave – conversation from what and what – to why are we doing this again?*

*Jason think it hasn't shifted – it is what it means and how accomplished Jason – if all info is on the web – why not more people jumping on board? Maybe we haven't sold it? – In the market – how much impact???*

Dave – behavioral changes have occurred in change of attitude and understanding go infrastructure and interoperability. Diff now then it was 10 or 5 years ago??/

Jason – this is bigger commitment and exposure – how do we do that?

*Dave – chicken and the egg – summit meeting in April – will be many new people and things we will see it is getting greater visibility – grant from Ohio, dept of education – Karen cantor cto of dept of education.*

*Dave – no way for anyone to know the web services –*

*Jason - Summit meeting – have to sell them what it is and why they need to get involved?!*

Dave – inhibited by a call to action – to get sghe or oracle or anybody to show their self interests will be satisfied?

*Jim – model we looked at in terms o wb ui is nice model for what we are trying to accomplish? Who is going to take the open source and modify to make it work for EdUnify?? If they can prototype that then in a sense we are done until we have response from a larger group.*

Dave – summary tech doc as vehicle and comes back to Jason – if govt funding is there an expectation? –

Dave – 1 or 2 page doc outlining business case and can be edited from there

## **March 2, 2010 Meeting Agenda**

### 1. (FROM INITIAL MEETING ON JAN 27, 2010)

Begin to outline the scope, assignments and timeframe for the creation and approval of the PESC EdUnify business plan. The business plan is to outline the business market, business requirements; cost structure and revenue for EdUnify. Potential list of assignments:

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- Operational Requirements, what would we need to launch
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Edunify Business case - review Dave's write up

- a. Requirements - the what that is needed - requires assignment
  - b. Edunify management requirements - resources, cost to support - requires assignment
  - c. Edunify revenue requirements - revenue - requires assignment
2. Vendor buy in - what is value of them to participate? - requires assignment

Attendees:

Ed Hauser, SunGard Higher Education

## **Meeting Notes:**

Dear Colleagues:

Below are the meeting notes from today's EdUnify business plan call. Attendees included:

Ed Hauser, SunGard Higher Education

Dave Moldoff, AcademyOne

Bill Hollowsky, SGHE

Jon O'Bergh, Dept of Ed

Jeff Alderson, ConnectEDU

The group made some good progress in outlining the needs for the business plan. Two distinct artifact needs were outlined and assignments were made below for each assignee to take a shot at organizing the sections below which will ultimately become the EdUnify Business Plan Document. If those assigned could forward their slides and or sections to me by COB next Monday March 8, I can compile them and distribute for review for our next meeting on Tuesday March 9. The artifacts include:

1. Presentation of the business case to stakeholders - deck - 10 slides max - **Jeff Alderson** will take a shot at draft slides for next week
2. Business plan 20 page MAX. See Sections below with assigned members to put together a 1-2 page section:
  1. Executive Summary - refer to Dave's document and summarize here - **Ed Hauser**
  2. Industry issues- refer to Dave's document and summarize here **Ed Hauser**
    - interoperability
    - transparency of data
    - Ability to logistically look at what is going on in the industry - global perspective
      - help students understand and measure progress
    - Business Problem??
    - we have a product that meets this need and satisfies x needs -
      - how does EdUnify help with transparency and interoperability - mapping of data?
      - common data standards across boundaries - e.g. state, country
      - aggregation of data
  3. Business Requirements - **Jon O'Bergh**
    - outline or summarize what is in the wiki
  4. Architecture Summary - **Jim Wager** (assigned by the group - let Ed Hauser know if unable to do)
    - describe the technology and architecture - diagram???
  5. Financial Models - revenue and expense combined - 5 year P & L - **Dave Moldoff**
    - a. Funding - tailor business case for the funding method??
      - scaled back vision of what this could be for short term??
      - need specific impactful way that leverages what we need??
      - exploratory venture concept? given current economic climate
      - goals - early fast funding and get to scale as quickly as possible
      - govt money as opposed to membership funding
      - seed funding vs sustainability funding
      - Sustainability of a Federated EdUnify?
      - Expense Model - Resources needed
        - staffing
        - hardware
        - support for the communities
        - Resource Requirements for Startup/Proof of Concept, Hosting/Virtualization
        - Staffing Plan by Phase
        -
      - Revenue Model
        - Fees and Rationale -Registration Services - Query Services - Agent Services
      -
6. Qualifications for Participating - **Jason Elwood** (assigned by the group - let Ed Hauser know if unable to do)
  - a. Service level agreement
  - b. Terms of use
7. Marketing- **Leslie Kaufman** (assigned by the group - let Ed Hauser know if unable to do)\* Operational Requirements, what would we need to launch
  - Adoption, Marketing, Alignment of Self Interests
  - Overcoming Fear, Anxiety and Proprietary implications
8. Summary and Call to action
9. Appendix