Illinois Mathematics and Science Academy ®
Igniting and nurturing creative, ethical scientific minds that advance the human condition

Project Management Office (PMO)

IMSA 2022 Global Strategy Project Charter

Project Purpose
The project will implement recommendations made by major departments, to prepare the Illinois Mathematics and Science Academy (IMSA) to expand services to non-Illinois students (50 in 2022, 100 in 2023, and 150 in 2024). This project will enable revenue growth needed to secure resources for new residence halls since our current halls are over 30 years old and in great need of repair. Additionally, this project aligns with the IMSA Impact and Outcomes statement, “By 2022, IMSA is a recognized global leader and catalyst in equity and excellence in STEM teaching and learning, innovation and entrepreneurship.”

Project Scope
The project team members will develop a plan to design, develop and implement enhancements needed to prepare their respective departments to support the arrival of non-Illinois students in the fall semester of 2022. The plans will not be implemented until reviewed and approved by the sponsor and key stakeholders (Cabinet members.)

The outcomes of the project will be enhance IMSA’s capability to support incoming non-Illinois students in 2022, 2023 and 2024, in the following areas:

<table>
<thead>
<tr>
<th>Admissions</th>
<th>Will plan actions, procedures, systems and materials to recruit, manage applications, select, then onboard selected non-Illinois applicants.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Residence Halls</td>
<td>Lodging facilities will be planned, designed, procured, and built for incoming students in 2022, 2023 and 2024.</td>
</tr>
<tr>
<td>Operational Capabilities/HR</td>
<td>Operations team will determine and develop the support capabilities, processes, technologies and materials required to support incoming students; this will include Marketing, Human Resources (HR), Business Office, Safety &amp; Security, Facilities team readiness.</td>
</tr>
<tr>
<td>HR will develop a staffing model to define how many and what roles and skills are required to support incoming students in 2022, 2023 and 2024.</td>
<td></td>
</tr>
<tr>
<td>Residential/Student Care</td>
<td>The Residential Life/Student Affairs teams will define curriculum and procedures to be enhanced to support and respond to need of non-Illinois students, to include a system to provide care during extended weekends, holidays and Academy closure days.</td>
</tr>
<tr>
<td>Academic Programs &amp; Services</td>
<td>The academic curriculum &amp; learning support services will be planned, designed and developed to be ready for incoming classes of non-Illinois &amp; international students in August 2022, 2023 and 2024.</td>
</tr>
<tr>
<td>Outreach programs, through IMSA Centers, will plan and develop programs that increase recognition of, and showcase, IMSA values, including international programs by 2020.</td>
<td></td>
</tr>
</tbody>
</table>
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**Project Management Office (PMO)**

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Assigned Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sponsor</strong></td>
<td>Authorizes work, removes barriers, sets priorities, and manages project scope.</td>
<td>Jose Torres, President</td>
</tr>
<tr>
<td><strong>Project Manager</strong></td>
<td>Develops project plan, schedules, tracks and report progress, escalates risks</td>
<td>Richard Busby, PMO Director</td>
</tr>
<tr>
<td><strong>Process Manager</strong></td>
<td>Coordinates project management tasks, responsible for assigned internal project management deliverables and document management.</td>
<td>Mary Collins, Director Special Projects</td>
</tr>
<tr>
<td><strong>Team Members</strong></td>
<td>Performing activities to create deliverables</td>
<td>Tami Armstrong, Office of Public Affairs (OPA) &amp; Development, Lee Eysturlid, History &amp; Social Science, Ralph Flickinger, Information Technology Services (ITS), Katelyn Lancaster, Office of Public Affairs (OPA), Kelly Lofgren, Admissions, Joe Marshal, World Languages, Joe Mastrocola, Human Resources (HR), David McGovern, College and Academic Counseling (CAC), Sarah O’Leary-Driscoll, Science Faculty, Kelly Page, Center for Innovation and Inquiry (CI&amp;I), Jim Read, Security, Gwen Seeley-Joosse, Center for Teaching &amp; Learning (CT&amp;L), Andrea Stuiber, Residential Life, Christine Zhang, World Languages</td>
</tr>
<tr>
<td><strong>Key Stakeholders</strong></td>
<td>Represents areas for which the project is intended to support</td>
<td>Katie Berger, Executive Director, Student Affairs, Bud Bergie, COO/CIO, Traci Ellis, Executive Director, HR, Bob Hernandez, Principal, Storm Robinson, Executive Director, CT&amp;L</td>
</tr>
</tbody>
</table>
Project Schedule

- Facility Plan/Design for 2022
- Facility Build for 2022
- Facility Plan/Design for 2023+
- Facility Build for 2023+
- Facility Plan/Design for 2024+
- Facility Build for 2024+
- Facility Move-in Ready 2022
- Facility Move-in Ready 2023
- Facility Move-in Ready 2024
- Admissions Strategy
- Admissions Systems/Processes/Forms
- Recruit for 2022
- Onboard 2022
- Recruit for 2023
- Onboard 2023
- Recruit for 2024
- Onboard 2024
- Recruit for 2025
- Plan Operations Enhancements
- Plan HR Staffing Model
- Develop Marketing Plan
- Develop Operations Enhancements
- HR Hire/Onboard Staff for 2022
- HR Hire/Onboard Staff for 2023
- HR Hire/Onboard Staff for 2024
- Develop 10th Grade Curriculum
- Deliver 10th Grade Curriculum
- Develop 11th Grade Curriculum
- Deliver 11th Grade Curriculum
- Develop 12th Grade Curriculum
- Deliver 12th Grade Curriculum
- Develop Center 2020 Programs
- Deliver Center 2020 Programs
- Develop Center 2021 Programs
- Deliver Center 2021 Programs
- Develop Center 2022 Programs
- Deliver Center 2022 Programs
- Develop Center 2023 Programs
- Deliver Center 2023 Programs
- Develop Center 2024 Programs
- Deliver Center 2024 Programs
- Design RL/SL Programs
- Develop RL/SL Programs
- Deliver RL/SL Programs
Project Budget (Cost to establish certification, reputation, learn and recruit)

<table>
<thead>
<tr>
<th>Year</th>
<th>Consulting</th>
<th>SEVP App</th>
<th>Memberships</th>
<th>Conferences</th>
<th>Travel</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fy20</td>
<td>10,000</td>
<td>2,355 (IMSA Global Enterprise)</td>
<td>14,000</td>
<td>2,000</td>
<td>7,500</td>
<td>35,855</td>
</tr>
<tr>
<td>Fy21</td>
<td>10,000</td>
<td></td>
<td>14,000</td>
<td>2,000</td>
<td>10,000</td>
<td>36,000</td>
</tr>
<tr>
<td>Fy22</td>
<td>5,000</td>
<td></td>
<td>14,000</td>
<td>2,000</td>
<td>10,000</td>
<td>31,000</td>
</tr>
<tr>
<td>Fy23</td>
<td>5,000</td>
<td></td>
<td>14,000</td>
<td>2,000</td>
<td>10,000</td>
<td>31,000</td>
</tr>
<tr>
<td>Totals</td>
<td>30,000</td>
<td>2,355</td>
<td>56,000</td>
<td>8,000</td>
<td>37,500</td>
<td>133,855</td>
</tr>
</tbody>
</table>

Contingencies & Dependencies

<table>
<thead>
<tr>
<th>The Following Key Drivers</th>
<th>Dictate These Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student and Exchange Visitor Program (SEVP) Certification for IMSA</td>
<td>Ability to offer &lt; 1 year student experience at 10th grade</td>
</tr>
<tr>
<td>SEVP Certification for IMSA Global Enterprise (IGE)</td>
<td>Ability to offer a 3 year (10th-12th grade) student experience</td>
</tr>
<tr>
<td>Ability to offer a 3 year student experience</td>
<td>Partnerships with SEVP certified private schools</td>
</tr>
<tr>
<td>Student housing availability</td>
<td>Recruiting &amp; ability to onboard students in 2022, 2023 and 2024</td>
</tr>
<tr>
<td>Domestic/international market research results (Kalix)</td>
<td>1. Recruiting strategy</td>
</tr>
<tr>
<td>Actual demand, based on applications in 2022, 2023 and 2024</td>
<td>Drives growth strategy for years 2, 3+</td>
</tr>
<tr>
<td>Available funding for construction</td>
<td>Speed and scope of facilities construction in 2021, 2022 and 2023</td>
</tr>
<tr>
<td>Curriculum readiness</td>
<td>Ability to onboard students in 2022, 2023 and 2024</td>
</tr>
</tbody>
</table>

Project Assumptions

- Team members perform project activities within their current employment agreement
- Major project costs will be association fees, consulting, conference participation and travel
- IMSA can become capable of hosting 3 year F-1 visa students
- Project strategy will be adjusted based on data from market research and actual results
Project Risks

<table>
<thead>
<tr>
<th>Risks</th>
<th>Impact On</th>
<th>Likelihood</th>
<th>Mitigation/Contingency</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEVP does not certify IMSA to issue 1 year student F-1 visas</td>
<td>Revenue and Recruiting</td>
<td>Low</td>
<td>Plan B: Focus on domestic students</td>
</tr>
<tr>
<td>Market research not supporting domestic student recruitment projections</td>
<td>Revenue and Number of applicants</td>
<td>Moderate</td>
<td>Determine realistic revenue</td>
</tr>
<tr>
<td>Market research not supporting international student recruitment</td>
<td>Revenue and Number of applicants</td>
<td>Moderate</td>
<td>Emphasize domestic recruiting</td>
</tr>
<tr>
<td>Market research not supporting multi-year F-1 visas</td>
<td>Revenue and Number of applicants</td>
<td>High*</td>
<td>Research the value of partnering with SEVP certified private school to offer a fee-based “IMSA Experience” for private school students</td>
</tr>
<tr>
<td>Negative international political and economic environment, forces and trends</td>
<td>Strategy</td>
<td>Moderate/High**</td>
<td>Respond by communicating expectations and revise goals if reasonable</td>
</tr>
</tbody>
</table>

*Marked High after DHS initial visit on 6/11/2019.
**Raised to Moderate/High after Beijing delayed summer educator program due to geo-political concerns 6/14/2019

Scope of work
- I-17 Application for Academy submitted to ICE/DHS for approval (submitted May 2019)
- Academy receives permission to issue F-1 visas
- Admissions strategy
  - Admission policies for non-Illinois students
  - Application process
  - International admission requirements
  - Tuition/fee schedule
  - Recruiting plan
- Communications strategy
  - “Why IMSA” unique selling point(s)
  - Virtual tour videos of campus/community/state
  - Print collateral material
  - Website
  - International social media presence
- Academy/IMSA Global Enterprises (IGE) working agreements
  - Policies (Students, employees, intellectual property, others)
  - Student room and board
  - Curriculum
  - Fundraising/Lobbying/Legal Strategies
  - Employee compensation
  - Shared services
  - Disbursement of revenues
  - IGE I-17 application filed
Project Management Office (PMO)

- Residential hall strategy
  - Plan for 2022, 2023 and 2024
  - Finances
  - Construction
- Operations strategy
  - Information technology
  - Marketing & Communications
  - Security
  - Food & Health services
  - Human Resources (staffing and training)
- Student care strategy
  - Residential life curriculum and programs
  - Onboarding
  - Mental health programs
  - Discipline
  - Host families
- Curriculum
  - Course offerings
  - English language support
  - Preparatory courses
  - Remediation strategy
- Outreach
  - Center for Teaching & Learning program offerings
  - Center of Inquiry & Innovation program offerings

Priorities
- Board Approval of Non-Illinois Student Admission Policies (required for SEVP)
- Identify IMSA’s differentiating value—“Why IMSA?” for non-Illinois applicants
- IMSA attains SEVP certification to invite F-1 students (1 year)
- Sign-off on Academy/IMSA Global Enterprises working agreements
- IMSA Global Enterprises attains SEVP certification to invite F-1 students (3 years)
- Construction of 2022 residential structure(s)
- Recruitment of domestic and international students
- Students arrive fall 2022

Authorization to Proceed:  
June 19, 2019  
Project Sponsor Signature and Date