

### Purpose

The Pre-Event Readiness and Continuity (PERC) Checklist has been designed to assist in the preparation and planning of major events (e.g. rollouts, upgrades, ventures, projects, or initiatives) that have the potential to impact ITS services and the Campus community. The following steps are general guidelines and suggestions that will prove beneficial in preparing for major events. PERC is intended to aid in broadly defining the project scope and implementation strategy. The actual checklist appears on the opposite of this page.

### Planning and Collaboration

Completing the Pre-event Readiness Checklist (PERC) is an initial step in preparing for periods of 'peak load' within ITS. Examples of such times include Fall Rush for the ITRC, and student voting and registrations. The following steps may be considered for successful planning and collaboration:

1. Complete the PERC document at the first opportunity once formal organization of a major event begins. The supervisor of the leading group who is responsible for the initiative owns the responsibility for completing or delegating the completion of the PERC document, as well as project and change plans.
2. Announce the event at SMC or another similar ITS venue. Ensure that all stakeholders are identified and included in communications as preparations progress.
3. Define any risks and assumptions within the 'Impacted Services' section of the PERC document.
4. Include critical success factors of the impending implementation.
5. Determine what support procedures/processes are required for long-term support.

### PERC Milestone Countdown

<b>8 weeks before event</b>	<b>Review staffing requirements, add to SMC agenda</b>
<b>6 weeks before event</b>	<b>No changes to services that require ITRC training</b>
<b>4 weeks before event</b>	<b>All change/communication plans filed and approved</b>
<b>4 weeks before event</b>	<b>Review notification procedures</b>
<b>2 weeks before event</b>	<b>All changes/upgrades/patches tested</b>
<b>1 week before event</b>	<b>All maintenance and production changes complete</b>

### Long-term Support

1. Define the support groups and associated responsibilities for each component of the event. At a minimum, primary support groups or Remedy group names should be outlined.
2. Consider developing Service Level Agreement (SLA) or Operational Level Agreement (OLA) documents with supporting departments, if applicable. OLAs and SLAs should address specifics: support management, availability, service levels, functions, procedures, and staffing.

# Pre-Event Readiness and Continuity (PERC) Checklist

## Advance Planning

Description of initiative or event: \_\_\_\_\_

Overall Potential Impact to UNC Campus and Community:

Enterprise     Multiple Services     Multiple Departments     Multiple ITS Units

**Note:** If Enterprise and another potential impact are selected, a Communications Plan (Advance Notification section) is required.

Project Plan?     Yes     No    Project ID: \_\_\_\_\_ Project Manager: \_\_\_\_\_

Associated Change Plan ID(s): \_\_\_\_\_

Estimated Start Date and Time: \_\_\_\_\_ Estimated End Date and Time: \_\_\_\_\_

## Stakeholders

Define stakeholders or partners in this initiative: \_\_\_\_\_

## Impacted Services and Risks

Detailed listing of impacted services: \_\_\_\_\_

Have notification procedures been confirmed in the event of difficulties? \_\_\_\_\_

What risks are involved, or what difficulties may be encountered? \_\_\_\_\_

## Advance Notification

What forms of communication are being used?

Mass Email     UNC Homepage     Mass Voicemail     962-HELP IVR     UNC Cable (CATV) Slides  
 help.unc.edu     ITS Change Plan     ITS Message Center     Other: \_\_\_\_\_

Integrated Communications? (Yes or No)     Communications Plan     Communications Checklist

Who is responsible for developing and distributing notification procedures? \_\_\_\_\_

How will status updates be communicated, and how often will follow-up information be provided? \_\_\_\_\_

## Support Model Outline and Guidelines

Staff Training Necessary     Vacation Moratorium     help.unc.edu documentation

Define Support Groups/Remedy Groups: \_\_\_\_\_

Additional Resources and Considerations: \_\_\_\_\_

SLA/OLA Necessary?     Yes     No    If yes, who, or what groups, will develop necessary agreements?