

# Smart Campus Readiness Workbook and Scorecard

This scorecard is based on the Smart Campus Readiness Assessment Framework as defined in the *Smart Campus Manifesto*. Completing the scorecard provides several key advantages to institutional planners:

- Enables shared operational truth and understanding while fostering collaboration.
- Prevents technology overreach, emphasizes human aspects
- Surface governance and cultural blockers early
- Creates a defensible baseline for boards, auditors, and funders
- Helps align actions directly with phased execution and strategic goals

## How to Use This Workbook

1. Score collaboratively – this is not a solo exercise
2. Evidence beats opinion – note concrete examples
3. Disagreement is a signal – surface it, do not smooth it over
4. If between levels → score the lower level
5. The final output is about the overall profile, not a single number, and the priority actions that need to be taken.

## Scoring Key (Used Throughout)

Refer to the five domains of readiness rubrics for explanations of each criterion and level. In general, the scoring levels indicate the following:

### Exhibit 1. General Meaning of Readiness Levels

| Score Level                                 | Manifesto-Aligned Meaning                                                                                                                                                                                                                                                                                                   |
|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 Siloed, Reactive, and Heroic              | Fragmented IT and Facilities operations with limited visibility, unmanaged or “shadow” IT/OT, inconsistent standards, and reactive response to failures. Risk is absorbed through heroics rather than governance or architecture.                                                                                           |
| 2 Stabilizing, Developing, Identifying Risk | Cross-functional collaboration has begun, and visibility is improving. Some governance and standards exist, but they are inconsistently applied. The institution is reducing fragility, containing risk, and stabilizing operations — yet remains dependent on point solutions and manual coordination.                     |
| 3 Integrated, Governed, and Resilient       | IT and OT are formally integrated under shared governance and architectural standards. Shadow IT/OT is eliminated. Systems are observable and recover reliably from disruption. Improvements are deliberate and governed, but learning is still episodic rather than systemic.                                              |
| 4 Carefully Architected, and Antifragile    | The campus is intentionally designed as a governed cyber-physical system. Enterprise standards, data semantics, security, and workflows are continuously enforced. Disruptions generate insight that improves future performance. Learning, optimization, and adaptation are continuous, measurable, and institutionalized. |

# Workbook

**Institution:** \_\_\_\_\_

**Assessment Date(s):** \_\_\_\_\_

**Assessment Coordinator/ Facilitator:** \_\_\_\_\_

**Participants (Roles):**

☐ IT / Security \_\_\_\_\_

☐ Facilities / Operations \_\_\_\_\_

☐ Sustainability \_\_\_\_\_

☐ Budget & Finance \_\_\_\_\_

☐ Academics / Research \_\_\_\_\_

☐ Campus Safety \_\_\_\_\_

☐ Others (list): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

---

Additional Notes

## Domain I: Architecture, Data, and Integration Readiness

### 1.1 OT Asset Visibility

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/examples observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 1.2 Network Infrastructure

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/examples observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 1.3 Data Estate, Ontology & Semantics

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/examples observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 1.4 Integration Architecture

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/examples observed:

- \_\_\_\_\_
- \_\_\_\_\_

### Domain I Summary

Domain Score (1–4): \_\_\_\_\_ (sum / 4)

Identified Strengths:

Opportunities For Improvement:

Action Plan:

## Domain 2: Cybersecurity & Cyber-Physical Risk Readiness

### 2.1 Network Segmentation

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 2.2 Identity & Remote Access (Staff + Vendors)

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 2.3 Incident Response (IT + OT)

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence / Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 2.4 Risk Governance & Executive Visibility

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### Domain 2 Summary

Domain Score (1-4): \_\_\_\_\_ (sum of scores/4)

Identified Strengths:

Most Significant Exposure/Risk/Issues:

Action Plan:

## Domain 3: Operational & Workflow Readiness

### 3.1 Maintenance Posture

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 3.2 Alarm & Event Management

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 3.3 Workflow Integration (Data → Action)

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 3.4 Operational Metrics & Feedback

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

## Domain 3 Chapter Summary

Domain Score (1–4): \_\_\_\_\_ (sum of scores/4)

Identified Strengths:

Operational pain points surfaced:

Action Plan:

## Domain 4: Culture & Change Enablement Readiness

### 4.1 IT–Facilities Trust & Collaboration

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 4.2 Change Management Discipline

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 4.3 Operator Experience & Adoption

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 4.4 Learning from Failure

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### Domain 4 Summary

Domain Score (1–4): \_\_\_\_\_ (sum of scores/4)

Cultural Strengths:

Cultural Constraints and Issues:

Action plan:

## Domain 5: Governance & Strategic Alignment Readiness

### 5.1 Decision Rights & Accountability

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 5.2 Procurement & Standards Enforcement

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 5.3 Strategic & Capital Alignment

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### 5.4 Executive Visibility & Outcomes

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Evidence/Examples Observed:

- \_\_\_\_\_
- \_\_\_\_\_

### Domain 5 Summary

Domain Score (1-4): \_\_\_\_\_ (sum of scores / 4)

Governance Current Strengths/Abilities:

Overall Assessment Implications/ Summary

Action Plan:

## *Summary of Domain Scores*

Record the domain assessment scores below. The score should be the average of the scores.

| Domain               | Score |
|----------------------|-------|
| Architecture & Data  | _____ |
| Cybersecurity & Risk | _____ |
| Operations           | _____ |
| Culture & Change     | _____ |
| Governance           | _____ |

### **Key Insight**

*The lowest-scoring domain represents the primary inhibitor and the maximum safe speed of the Smart Campus program, and likely the area of initial action for greater readiness.*

### **Top 3 Readiness Gaps (Priority Order)**

- 1.
- 2.
- 3.

### **Immediate Priority Actions (Next 90 Days)**

- 1.
- 2.
- 3.

### **Longer Term Action Plan:**

### **Facilitator Notes**

## Recommended Action Level Priorities

### *Phase Gate / Level I:*

#### *Governance and Discovery — Establishing Operational Truth*

**Objective: Prove the campus is governable before it becomes programmable.**

This initial gate validates that the institution has the leadership structures, decision rights, and visibility required to initiate smart-campus work responsibly. The focus is on discovery, not deployment. Asset inventory is treated as the establishment of **operational truth**, exposing shadow OT, unmanaged vendors, undocumented dependencies, and latent cyber-physical risk.

**Phase Gate / Level 1 is achieved when the institution can demonstrate:**

- A formal Smart Campus Steering Committee (or equivalent) with authority
- Clear, documented IT, Facilities, Security, and Data decision rights
- A consolidated view of OT assets, networks, and vendor access
- Agreed on guiding principles for standards, risk tolerance, and scope control

### *Phase Gate / Level II:*

#### *Planning and the Digital Blueprint — Architecture Before Integration*

**Objective: Prove that we know the *why* and the *how*.**

This phase gate ensures the institution has translated vision into a coherent, shared design. Architecture is treated as a leadership discipline rather than a technical artifact. The Digital Blueprint establishes the future-state reference models for IT/OT architecture, cybersecurity, data, integration patterns, and lifecycle alignment.

**Phase Gate / Level 2 is achieved when the institution can demonstrate:**

- Approved reference architectures for IT/OT, security, and data estate
- Defined semantic and interoperability standards
- Documented integration, segmentation, and remote-access patterns
- Alignment between smart-campus priorities and capital/sustainability plans

*Phase Gate / Level III:*

*Foundation Integration — Stabilize and Integrate*

*Advanced complex initiatives do not scale beyond pilots until this gate is met.*

**Objective:** Prove the campus is stable, observable, and secure enough to trust.

This gate validates that foundational integration has been executed according to the blueprint and that operations are reliable under normal conditions. The emphasis is on stability, observability, and control, not advanced intelligence. Data begins flowing into the governed data estate, identity and access controls are enforced, and fragile point-to-point integrations are eliminated.

**Phase Gate / Level 3 is achieved when the institution can demonstrate:**

- Secure, segmented IT/OT connectivity as designed
- Enterprise identity and vendor access controls in force
- Reliable ingestion of core telemetry into the data estate
- Reduced operational surprises and improved recovery predictability

*Phase Gate / Level IV:*

*Scaling and Expanding — From Pilots to Platforms*

**Objective:** Prove value before multiplying complexity.

This level ensures successful, governed patterns to scale across buildings, systems, and domains. Scaling is evidence-driven and portfolio-managed, not opportunistic. The institution demonstrates that smart-campus capabilities are repeatable, interoperable, and supported by shared workflows and governance.

**Phase Gate / Level 4 is passed when the institution can demonstrate:**

- Repeatable deployment patterns validated across multiple assets
- Consistent data, integration, and security behavior at scale
- Measurable improvements in efficiency, resilience, sustainability, or experience
- Reduced dependence on proprietary or bespoke solutions

*Phase Gate / Level V:*

*Continuous Optimization — From Resilience to Antifragility*

**Objective: Prove that the campus learns and improves because of stress.**

This final gate represents the Manifesto's target state. The campus operates as an **antifragile cyber-physical system**—one that not only resists disruption, but systematically improves because of it. Optimization, commissioning, and learning are continuous, measurable, and institutionalized across technology, operations, and culture.

**Phase Gate / Level 5 is sustained when the institution can demonstrate:**

- Continuous commissioning and optimization loops
- Predictive and prescriptive insights embedded into daily operations
- Documented learning from failures, near-misses, and stress events
- Ongoing gains in performance, sustainability, and human experience