

A Fresh New Way to Process Project Requests

The University of Toledo Project Management Office (PMO) is excited to unveil a new plan for processing project requests. Many of you have great ideas you'd like to share with us that will save the university money, time, and resources or will improve the university's ability to address the strategic needs of our faculty, students, and staff through automated systems. The Project Management Office developed a new automated process for reviewing and streamlining requests. The new procedure provides governance groups with more detailed information to improve project prioritization. Non-strategic projects will be fast tracked to avoid waiting for the governance queue. This process will give us the ability to strategically align the IT department's resource pool to meet the demands of the university while increasing the turn-around time for project completion.

Introducing the New Project Request Form

The form can be accessed by going to this page: [Project Management Requests](#). Google Chrome is the recommended browser. When you click on this link the New Project Request form appears. **Requestor**, **Department**, and **Origination Date** will automatically populate in their designated boxes. The Requestor can be changed in cases where someone else is requesting on behalf of someone else. Click on the drop-down menu to select the type of **Business Unit**. A choice of Academic, Administrative, and Clinical will appear. Each project submitted must name a **Governance Committee Sponsor**. The drop down will be populated with current members of the governance committee based upon the selected Business Unit. Governance Committee Sponsors will be tasked with approving the project if it is classified as Regulatory or Operational, and championing the project if it is classified as Strategic. The **Executive Sponsor** textbox will automatically populate based on the Business Unit selection. Executive Sponsors are Karen Bjorkman for Academic projects, Matt Schroeder for Administrative projects and Dan Barbee for Clinical projects. This data cannot be changed by the requestor.

Enter the **Requestor's Manager** name (format: Last, First) or click on the browse icon to lookup the name. Use the calendar icon located next to the **Target Completion Date** to populate this box. Is a **Software Purchase Included** in this request? Click on the drop-down arrow and select (Yes, No, Unknown). *****If you select Yes, you must complete the Supporting Documentation section located at the bottom of the form.***

A yellow pop out message will appear next to each box that must be completed in order to submit. A red asterisk is also placed in boxes where information must be included to process requests.

Problem Statement

The Problem Statement should provide a comprehensive understanding of the problem you are trying to solve.

Solution Requirements

What must happen for the project solution to be a success? List the “must have” requirements that need to be included in the solution.

Current Business Process

What is the current process you are trying to improve? If needed, copy and paste a workflow diagram in this box or verbally explain it.

Proposed Business Process

Describe the new process you want implemented. **This process will evolve after an IT Business Analyst is assigned to meet with you.*

Project Drivers & Measures

All project requests are reviewed for completion by the Project Management Office. This committee is made up of Executive Leaders across the university who represent the interests of each department. Projects deemed strategic are forwarded to the executive sponsor for review and, with executive sponsor approval, are reviewed by the appropriate governance committee.

The Project Drivers & Measures section requires the requestor to assess and identify the value of the request as it relates to strategic, operational and regulatory drivers. Project requestors should select the appropriate measure from the drop-down list for each of the drivers.

For the first 6 drivers, if the driver is not applicable to the project, the requestor should leave the default value "No measurable impact...". For the last two drivers, if the driver is not applicable, the driver should be left blank.

If a measure is selected for the Regulatory/Accreditation Impact driver, the requestor must identify the Regulation or Article of Compliance.

Project Drivers & Assessments	
Improve student and academic success:	No measurable impact to student success
Achieve national prominence in research, scholarship, and creative activities:	No measurable impact in research, scholarship and creative activities
Foster a culture of excellence in our faculty, physicians, staff and alumni:	No measurable impact in culture of excellence in our faculty, staff and alumni
Build and maintain a strong financial foundation:	No measurable impact in build and maintain a strong financial foundation
Strengthen reputation and community engagement:	No measurable impact in strengthen our reputation and community engagement
Strategic Impact:	No measurable impact
Regulatory/Accreditation Impact:	
Disruption to Operations, if project is not completed:	

Below is a snapshot of the **Strategic Drivers and Measures Document**. A full list of the measures is included below each of the six drivers.

Strategic Drivers and Measures

Driver 1 : Improve student academic success

Measures:

1. Increase two or more measures: Reduce majority and minority gap by at least 5%, first-to-second year retention rate by at least 1.5%, 6-year graduation rate by at least 4.5%, or 20% attainment of Target 2022 strategic outcome in student success goals.
2. Increase one measure: Reduce majority and minority gap rate by at least 5%, first-to-second year retention rate by at least 1.5%, 6-year graduation rate by at least 4.5%, or 20% attainment of Target 2022 strategic outcome in student success goals.
3. Increase two or more measures: Reduce majority and minority gap rate by at least 3%, first-to-second year retention rate by at least 1.5%, 6-year graduation rate by at least 1.0%, or 10% attainment of Target 2022 strategic outcome in student success goals.
4. Increase one measure: Reduce majority and minority gap rate by at least 2.5% first-to-second year retention rate by at least .75%, 6-year graduation rate by at least 2.0%, or 5% attainment of Target 2022 strategic outcome in student success goals.
5. No measure impact to student success.

Driver 2: Achieve national prominence

Measures:

1. Increase measures: Increase the h-index by at least 10, and grant volume by 10%
2. Increase one measure: Increase the h-index by at least 10, or the grant volume by 10%
3. Increase measures: Increase the h-index by at least 5, and grant volume by 5%
4. Increase one measure: Increase the h-index by at least 5, or the grant volume by 5%
5. No measurable impact in research, scholarship, and creative activities

Driver 3: Foster a culture of excellence in our faculty, staff and alumni

Measures:

1. Increase measures: Increase faculty, and staff retention by at least 2%, and improve tenure track promotion rate by at least 1%, and increase alumni engagement by at least 2%.
2. Increase measures: Increase faculty, and staff retention by at least 1%, and improve tenure track promotion rate by at least 1%, and increase alumni engagement by at least 1%.
3. Increase measures: Increase faculty, and staff retention by at least 0.5%, and improve tenure track promotion rate by at least 0.5%, and increase alumni engagement by at least 1%.
4. Increase measures: Increase faculty, and staff retention by at least 0.25%, and improve tenure track promotion rate by at least 0.25%, and increase alumni engagement by at least 0.5%.
5. No measurable impact in culture of excellence in our faculty, staff and alumni.

Driver 4: Build and maintain a strong financial foundation

Measures

1. Increase measures: Increase in enrollment FTE's by at least 100, or increase net revenue by at least \$1 mil, or financial impact from technology services or operation efficiencies by at least \$1 mil.
2. Increase measures: Increase in enrollment FTE's by at least 50, or increase net revenue by at least \$500K, or financial impact from technology services, operation efficiencies by at least \$500K.
3. Increase measures : Increase enrollment FTE's by at least 25, or increase net revenue by at least \$250K, or financial impact from technology services, operation efficiencies by at least \$250K.
4. Increase measures: Increase in enrollment FTE's by at least 10, or increase net revenue by at least \$1 mil, or financial impact from technology services, operation efficiencies by at least \$125K.
5. No measurable impact in build and maintain a strong financial foundation.

Driver 5: Strengthen our reputation and community engagement

Measures:

1. Increase philanthropy through under graduation alumni giving participation rate increase of at least .25% or increase total gift amount by 5%
2. Grow the UT Healthcare System by increasing quality scores by at least 5% or increasing the number of new patients by at least 2,000.
3. Increase sustainable increase in fan attendance at UT sporting events.
4. Increase measure: Increase average ACT Score of incoming freshmen or strengthen GPA of student athletes.
5. No measurable impact in strengthen our reputation and community engagement

Driver 6: Strategic Bonus Segments

Measures:

1. Supports special senior leadership initiatives.
2. Enables or directly improves diversity.
3. Enables or directly connects to UT Strategic Plan
4. Enables or directly connects to UT Master Plan or directly supports external relationships.
5. No measurable impact.

University of Toledo Strategic Plan: <http://www.utoledo.edu/strategicplan/>
Biannual updates on the Strategic Plan: <http://www.utoledo.edu/strategicplan/OutcomesResponsibilities.html>

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Regulatory Drivers & Assessments

Regulatory/ Accreditation Impact: (Choices)

1. Regulatory deadline < 6 months and significant penalties
2. Regulatory deadline > 6 months and significant penalties
3. Regulatory deadline < 6 months and minimal penalties
4. Regulatory deadline > 6 months and minimal penalties
5. (Blank) -default

After a Regulatory/Accreditation Impact is selected, the requestor **MUST** define the regulation.

Regulatory/Accreditation Impact: Regulatory deadline < 6 months and significant penalties Define Regulation: <input type="text"/>
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If failure to do the project work will cause a disruption in service, select **Operational** from among the following choice options listed in the drop-down menu.

Disruption to Operations, if project is not completed: (choices)

1. Disruption if not completed < 3 months and major impacts w/no work around
2. Disruption if not completed < 6 months and major impacts w/no work around
3. Disruption if not completed < 3 months & minor impacts w/work around
4. Disruption if not completed < 6 months and minor impacts w/work around
5. (Blank) - default

Financial Justification

There is a cost associated with implementing and maintaining all projects regardless of whether a software purchase is made. As a result, it is necessary to evaluate the initial costs, as well as, long-term reoccurring costs and cost savings a project will have in order to justify the investment by the university. In some cases, opportunity costs will be a factor and the cost of not doing a project should be explained in detail. Use the space below to record the **Estimated Cost Savings** and **Estimated Revenue Increase** for the New Project Request. ***Supporting Details MUST be included.** ** Some projects do not incur a cost savings or a revenue increase. Place a "0" in the box if that is the case and "N/A" for supporting details.*

Please carefully consider the financial impact – for example, does a project that delivers improvements to student retention also increase (or retain otherwise lost) revenue?

Projects that identify benefits (or cost avoidance) such as time savings, increased enrollment, penalties of non – compliance must provide estimates and supporting details for any such claims.

Better financial justification will allow for better prioritization of the work.

Financial Justification	
Estimated Cost Savings: <input type="text"/>	Estimated Revenue Increase: <input type="text"/>
Supporting Details <input type="text"/>	Supporting Details <input type="text"/>

Supporting Documentation

Software Purchase Included? Yes

When a request is made for a Software purchase, the Supporting Documentation must be completed prior to submitting the request for review.

The **Software Security Assessment** form and the **VPAT Template** must be completed by the **software vendor** (***prior to purchase**). IT will evaluate whether the software is compatible with the university system and identify any potential security risks with software implementation.

In some instances, departments purchase software without consulting IT first and then place a Project Request to install the software. Software Purchase's without consulting IT first **does not guarantee successful or available resources for software implementation. Not all software is compatible with UT's system. **Always check with IT first.***

Supporting Documentation	
Use this area to attach any supporting documentation for your request. If this request includes a software purchase, the <i>Software Security Assessment</i> and <i>VPAT Template</i> must be completed and attached. Use the links below to access these forms. Software Security Assessment: **Click Here** VPAT Template: **Click Here**	Attachments: 0 Click here to attach a file

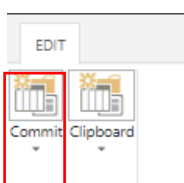
The Information Security Assessment Questionnaire can be accessed here: [Information Security Assessment Questionnaire](#).

The VPAT Template can be accessed here: [VPAT Template](#).

Summit the Request

The project request form is ready to submit when all the required fields are populated. If a software purchase is included and "Yes" is selected in the dropdown menu, two attachments must be included to process the request: Information Security Assessment Questionnaire and the VPAT Template.

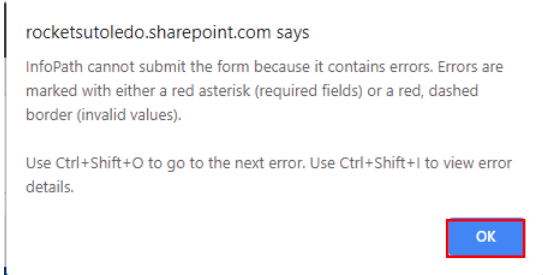
Click **Commit** located on the Edit tab to submit the request.



The option to **Save** or **Close** appears. Click **Save** to submit the request. (Clicking on **Close** will close-out the form without submitting the request).



If the form is incomplete and a field is not populated with a required response, the following message appears:



Project Approval Process

When a requestor submits a project request, the requestor's manager and the named Governance Committee Member sponsor are notified of the request. The submitted request is routed to the PMO and reviewed for completion and project type classification: Strategic, Operational, or Regulatory. The approval process routing is dependent upon the classification.

Projects deemed strategic are then routed to the Executive Sponsor for review and approval. From there the project moves into discovery mode where an IT Business Analyst works with the requestor to define a high-level scope statement and estimates of effort required by DTAS resources. Upon completion of the review, the project is presented to the appropriate Governance Committee for review and prioritization.

Strategic projects require approximately 3 weeks of DTAS review after approval by the Executive Sponsor.

Projects deemed operational or regulatory are then routed to the requestor's manager and Governance committee Member for approval. Upon approval, the project is routed directly to the DTAS team for further discovery and project staging. Prioritization of regulatory and operational projects is performed in collaboration with business unit leadership within available DTAS resource capacity.

Governance Approval Process

The Governance Committee meetings are scheduled every other month. Governance Committee members review project requests in a roundtable discussion and reassess the measures selected by the requestor. New

project requests and any previous requests (not started or < 50% complete) are prioritized and placed in the DTAS queue. Where there are constrained resources, it is possible for a lower priority project to be worked on and/or completed before higher priority projects. Projects are reviewed and compared with each other and then voted on by the committee. At least one representative from the project requestor's division will vote on the project and serve as the project's sponsor if the project is approved.