

## IS&T Project Request Procedure

### PURPOSE

The objective of the project request procedure is to ensure that resources are directed to discretionary projects that are aligned with the University's top priorities of enrollment and retention, cost reduction and operational effectiveness.

### SCOPE

This procedure applies to all IT projects with the exception of those that address regulatory compliance, software upgrades mandated by the vendor or address security vulnerabilities.

### PROCEDURE

#### Process Workflow



Requestor completes the project request form with assistance from IS&T and then provides it to their division gatekeeper.

The division gatekeeper reviews all requests received asking for additional information as they deem necessary and assigns an initial priority. The requests are then presented to the division vice president.

The division vice president and gatekeeper review the requests and assign a final priority to each. The requests are then submitted to the Executive Technology Committee to be prioritized with all other requests.

The Executive Technology Committee meets monthly to discuss new requests and to change priority of previous project submissions if necessary.

IS&T plans work assignments as appropriate resources become available based on the priorities determined by the Executive Technology Committee.

## **The Gatekeeper Role**

Gatekeepers are individuals to which all project requests for a given division are directed. They are responsible for reviewing the completeness of the required information and for working with the requestor to understand the need in order to establish a project's priority.

Each college will have a process of internal approvals that will span department chairs and the college dean prior to submitting a project request to the college gatekeeper appointed by the provost.

The gatekeeper will periodically meet with their division vice president to review any new requests that have been received or to change the priority of a previously submitted request. Together they will assign an agreed-to priority and determine which requests should be sent on to the Executive Technology Committee for discussion and prioritization in conjunction with all other requests.

### **Gatekeepers:**

All Colleges	Vice Provost for Academic Planning
Institutional Research	Vice Provost for Academic Planning
Student Affairs	Assistant Director Campus Support Services
Enrollment Services	Assistant Vice President Office of University Registrar
Finance	Financial Systems Administrator
Sponsored Programs	Director for Sponsored Programs & Research Services
Human Resources	Manager HR Information Systems
Marketing	Associate Vice President University Marketing
Development	TBD
General Counsel	Manager of Records Retention
University Engagement	Director of Administration
Athletics	TBD

## **The Executive Technology Committee**

The Executive Technology Committee is responsible for reviewing project requests that have been submitted from all areas on campus. Each request is rated against a set of criteria to develop a comprehensive list of projects in order of priority. The rating criteria is based on the institution's priorities of enrollment and retention, cost reduction and operational effectiveness.

The committee membership is comprised of the following:

Provost  
VP for Business Affairs and Finance  
VP for Student Affairs  
VP for Enrollment Services  
Chief of Staff

Representatives from Information Services and Technology attend each meeting to assist the committee by providing additional information if requested. (e.g., project duration, complexity)

The committee meets once a month to discuss any new requests that have been received and if necessary to change the priority of a project previously submitted. The decisions arrived at by the committee are communicated back to each area by their respective committee member.

This process assists Information Services and Technology in directing resources to those discretionary projects that the senior leadership of the institution has deemed most important. Information Services and Technology will use this prioritized list to plan work assignments as appropriate resources become available.

**Rating Criteria**

<b>Criteria</b>	<b>Rating</b>	<b>Definition</b>
Incremental Funding	Yes / No	Is funding available for software, consulting and on-going maintenance costs?
Alignment to Strategy	0	The project has no alignment to the strategic direction of the university.
	1	The project aligns to at least one strategic objective.
	2	The project aligns to at least two strategic objectives.
	3	The project aligns to at least three or more strategic objectives.
Operational Effectiveness	0	The project introduces no efficiency improvements for the university.
	1	The project introduces limited improvements to processing efficiencies of the university.
	2	The project introduces moderate efficiency improvements to university processes.
	3	The project introduces significant process improvements for the university.
Cost Reduction	0	The implementation of this project provides no reduction in operating expense but is required as part or in support of infrastructure, systems or services.
	1	The implementation of this project provides minimal cost savings.
	2	The implementation of this project provides moderate cost savings.
	3	The implementation of this project significantly reduces operating costs.

<p><b>Ease of Implementation</b></p>	<p>0</p> <p>1</p> <p>2</p> <p>3</p>	<p>Implementing the project introduces entirely new infrastructure and/or organizations and/or processes to the university systems and services.</p> <p>Implementing the project introduces infrastructure changes and/or organizational changes and/or processes in which the university has limited experience.</p> <p>Implementing the project requires limited changes to the existing infrastructure or organization or process flows.</p> <p>The project can be implemented easily into the existing infrastructure and/or organization and/or process flows.</p>
<p><b>Lifetime IT Resource Requirement</b></p>	<p>0</p> <p>1</p> <p>2</p> <p>3</p>	<p>This project requires at least one full-time IT resource annually.</p> <p>This project requires 50% of an IT resource for support.</p> <p>This project requires 25% of an IT resource for support.</p> <p>This project requires no IT resource support.</p>

## Project Request Form

1. Requestor Information						
Today's Date:						*Required
Your Name:						*Required
Your CSU ID						*Required
Requestor Dept.						*Required
Campus Location						*Required
Planning Unit:	*Required	Phone:	*Required	Email:	*Required	
2. General Project Information						
Project Name:						*Required
Division Head (Sponsor):	*Required	Sponsor Priority: Lo, Med, Hi		*Required		
Proposed Start Date:	*Required	Proposed End Date:	*Required			
3. Project Definition (Required for Rating)						
DESCRIPTION: Briefly describe the purpose and the intended business value of this project.						*Required
REQUIREMENTS: List all requirements this project must deliver.						*Required
EXECUTIVE SUPPORT: List the names and titles of persons in your direct, upward line of supervision who is aware of, and actively supports this project.						*Required
STRATEGIC ALIGNMENT: Describe how this project aligns with the University's general objectives.						*Required
FUNDING: Indicate whether or not funding has been identified for initial or on-going costs.						
COST: Estimate the dollars that will be spent for this project (initial and on-going, external).						
RISK MITIGATION: Describe any disruption or danger to the University if this effort is undertaken, and/or if it is NOT undertaken.						*Required
URGENCY: Describe extent to which realizing the benefits are dependent upon time. List and describe any deadline dates involved.						
DEPARTMENT RESOURCES: List the persons in your area who will be assigned to this project. Include: Primary functional contact, secondary contacts, and wrk-hrs/wk available to work on this project.						
VISIBILITY/IMPACT: Estimate how many persons this project will impact, and describe how it will impact them.						*Required
BENEFIT/OUTCOME: Describe advantages from productivity or business process improvement, cost savings, or revenue opportunity (estimate \$\$ for cost savings or revenue).						*Required
SUCCESS FACTOR/S: This project is successful when...						*Required

4. Other Project Definitions	
INTERFACES: List any other systems which will interact with, or be affected by the system in question.	
SYSTEM REQUIREMENTS: List any particular requirements in regard to user-interface, system speed, etc.	
DEPENDENCIES: If applicable, describe associated projects or efforts on campus which will affect project success.	
COMMUNICATION: Describe any needs for official communications or announcements, and your plans for filling those needs.	
TRAINING & DOCUMENTATION: Estimate how many systems users will need training as a result of this new system, change, or upgrade. Describe your plans for providing the training and documentation (manuals, user guides, etc) necessary.	
PROPOSAL COLLABORATION: List any other CSU depts or persons contacted in this effort, any outside parties contacted (e.g., higher-ed institutions contacted, outside vendors, etc.)	
INITIATIVE TO DATE: If applicable, describe your effort to date - e.g., any preliminary conversation with IT, any software purchases, personnel adjustments, etc.	
SECURITY ISSUES: Describe security issues -e.g., Social Security # storage, need for secure log-in or limited access, data classifications: minimum, moderate or maximum sensitivity, any data controls in place...	
OBSTACLES: Describe any obstacles to success that you foresee.	
ALTERNATIVE SOLUTIONS: If applicable, describe any alternative solutions you have considered, or would like to consider	
OTHER: Provide any further information you wish to share about this project, relative to scope, objectives, consequences, etc.	

**ISSUED:** 1/20/2016

**REVISED:**

**Approval:**

William E. Wilson 1/20/2016  
 Senior Director, Budget and Operations