

Project Summary Process

As your team prepares a technology project request submittal, the following questions will help guide you through the project summary process. And remember, the IRT Project Management Team is always available to help!

Project Name

- *Choose a name that reflects the implementation – “what campus will know it as.”*

Division Priority

- *Specify divisional priority (divisional priority will be determined by the VP/AVPs of your division)*

Mandated Implementation?

- *Identify whether the project has been mandated by any of the following: Law or CO, Information Security Audit, President, or CIO, and the **date certain** it needs to be implemented by*
- *Has been recommended by the Cabinet?*
- *Will it be mandated in the next 1-2 years?*
- *Has not been mandated?*

Required Project Due to System(s) Going Out of Support/Compliance?

If yes, please specify the date of the system going out of compliance/support.

Does this project support University Imperatives?

1. Learning & Student Success
2. Teaching, Research, Scholarship & Creative Activity
3. Justice, Diversity, Equity, Inclusion, Belonging
4. Resource Development & Sustainability
5. Dedicated Community Involvement
6. Wellness & Safety

Is the Project Targeted to Modify/Improve Current Business Processes?

If yes, how?

Project Size

Note: IRT will determine project size

- *Small, 41 to 160 hours*
- *Medium, 161 to 320 hours*
- *Large, 320+*

Preferred Date/Target Release Date

- *Any consideration of release time? Spring or Winter break? At the beginning or end of the semester?*
- *How hard is the end date? Is it flexible/can it be re-scheduled?*
 - *The target dates should be Dec 31 or June 30 depending on the size of the project unless other dates are specified*
- *Review the release date with your sponsor(s)*

Problem/Opportunity

- *What is the problem? What is the opportunity?*
- *What values and outcomes are we delivering?*

Scope of Work

(Departments, please fill out to the best of your knowledge, IT Project Managers will be working with you on the detailed scope and requirements):

- *Required business requirements*
- *Optional business requirements*
- *Clarify what is in scope to close out the project*
- *What is out of scope?*
 - *Examples:*
 - *Training/documentation to be handled by the functional users*
 - *IRT is only responsible for configuration, and functional users manage everything moving forward*

Organizational Impact

- *Impacts single area/department*
- *Impacts several departments or entire division*
- *Impacts entire population (all students or all faculty or all staff)*
- *Campus-wide impact*

Tactical/Operational Impact

- *Improves productivity and/or reduces cost?*
- *Supports/maintains existing systems?*
- *Significant changes to the systems/operations?*
- *Major infrastructure change?*

Level of Change/Change Management

- *Will this project have a change management component?*
- *If yes, who will be responsible for it?*
- *What is the amount of IRT effort required?*

Dependency

- *Has the software been purchased?*
- *ICT required?*
- *Vendor dependency? Contract pending?*
- *Do we have funding?*
- *Do we need to hire new resources or consultants?*

Resources & Allocation

- *Identify resource(s) by team and effort both IT and functional*
- *When are the identified resources able to work on the project?*

Source of FTEs

- *Do we have existing FTEs to work on this project?*
- *Do we have to hire new FTEs for implementation or maintenance?*

Support & Maintenance

- Who is supporting and maintaining post-implementation?
- Is IRT Service desk required for support?
- Clarify and document role and responsibility

Source of Funding

- Identify which budget covers funding
- Is this a new or existing software?
- Is this a one-time cost or annual?
- What is the estimated Total Cost of Ownership (TCO)? Refer to the following charts:



Total Cost of Ownership Worksheet					
Estimated Cost	FY2022	FY2023	FY2024	FY2025	FY2026
Software	\$	\$	\$	\$	\$
License Fee	\$	\$	\$	\$	\$
Vendor/Professional Service Fee	\$	\$	\$	\$	\$
Infrastructure Cost: On-Premises	\$	\$	\$	\$	\$
Infrastructure Cost: Cloud Hosted	\$	\$	\$	\$	\$
PMO FTE	FTE	FTE	FTE	FTE	FTE
FTE: Technical (Implementation)	FTE	FTE	FTE	FTE	FTE
FTE: Functional (Implementation)	FTE	FTE	FTE	FTE	FTE
FTE: Technical (Maintain System)	FTE	FTE	FTE	FTE	FTE
FTE: Functional (Maintain System)	FTE	FTE	FTE	FTE	FTE

**FTE, specify allocation %. Is it an existing or new resource? If new who is funding it?*

Annual Budget Project List

- *Have you listed this project on the annual budget project list form? Projects that have an initial cost of \$50,000 or greater should be reported on the annual budget project list form, managed by ABA.*

Risk(s)

- *Functional Resources*
- *IT Resources*
- *Budget*
- *Time*