The IT project intake process allows any SPU faculty and staff to submit a project request for collaboration with CIS. The IT project intake process is the means which allows CIS to partner with the people behind every request and provide the best service to the university. The goals of this process are to:

- Properly define and plan potential projects to increase the likelihood of success.
- Facilitate collaboration between departments and teams in technology projects.
- Ensure that the technology projects that CIS initiate or assist with have the best interest of the university in mind.
- Allow CIS to be transparent about the projects we work on.

This article outlines the IT project intake process from start to finish.

If you have not submitted a project proposal, click here to fill out a short project request form.

To check the status of your project proposal, go to the Project Roadmap or the Project Backlog; or, contact a CIS BSA or PM.

Submit The Intake Form

The first step in the intake process is to submit the Project Intake Form. To fill out the form, you will need to know some basic information regarding the project:

1. What are the goals of the project?
2. Who is requesting and sponsoring the project?
3. When would you like the project to be completed?

The submission of the form creates a JIRA ticket. This ticket allows CIS, the project requester, and any other interested SPU faculty or staff to track the project throughout the intake process.

Information Gathering

Once the JIRA ticket has been created by the intake form, a member of the CIS Business Systems Team will contact the person who submitted the project intake form. The staff member will meet with the project requester to gather more information on the project and expand on the details initially submitted via the intake form. The conversation will center on the following project details:

- What is the project?
- Why do we (as a university) need to take on this project?
- When does this project need to be completed?
- Who should be involved in this project? The people involved are part of the project team.

Any additional SPU faculty or staff who are interested in the project and being part of the project team can be included in these initial conversations.

Scale & Scope

As the details of the project are discussed, the project team will begin to get an idea of the project’s scale and scope. The scale and scope is simply, how big the project is. The "size" of a project is impacted by a number of factors, including the project's potential benefits, costs, level of impact, and complexity. The scale and scope of the project is used to determine whether the project can be expedited through the intake process, it will inform the project charter in the definition stage, and it will be used to help with the project's prioritization and scheduling.

Expediting Projects

To remain agile and support quick-moving initiatives around the university, the IT project intake allows for projects to be expedited through the process. Expedited projects are immediately "accepted" - meaning CIS will partner on this project in the capacities in which we operate. However, this does not mean that the project will be implemented immediately. All accepted projects are still subject to scheduling, though most accepted projects should begin within 90 days of acceptance. Some projects that are expedited could also benefit from a project charter. With guidance from a CIS staff member, the project team can determine whether a project charter is helpful for their expedited project. If you believe that your project should be expedited, speak to the CIS staff member who is assisting you through the IT project intake process.

For a project to be considered for expediting, it must have both of the following characteristics.

1. [Insert characteristics]
2. [Insert characteristics]
**High Impact**
This characteristic should normally be coupled with either low resource cost or low complexity. Projects that meet either of the two characteristics and a high level of benefit or impact to the university will have an attractive cost-benefit ratio that can help its case for expediting. In this case, high-impact is relative to the cost of the project.

**SensusAccess** - The service helps accommodate disabled students by allowing all SPU students, faculty, or staff to automatically convert documents into accessible-formats like e-books, audio books, or digital braille.

**IT Service Catalog** - The service catalog publishes the list of software and services that SPU already pays for, which can help departments meet their operational needs with existing services and without the costs of purchasing or implementing new system.

**Low Cost or Complexity**
- Projects that are low in cost, complexity, or both are perfect candidates to be expedited. Costs can include monetary, time, and/or labor and the effect can apply to the university as a whole or just CIS. Low complexity can include the people, processes, and/or resources that are involved in the project. When this characteristic is combined with high impact of the project’s outcome, the project becomes a much more attractive candidate for immediate acceptance.

**SensusAccess** - This project had low resource costs overall to SPU, and even lower costs to CIS. The department’s involvement in the project was to help review the contract, add HTML iFrames to pages that will host the service, and coordinate implementation. Since SensusAccess is a SaaS service, the bulk of implementation is conducted by the vendor.

**IT Service Catalog** - Because this project primarily involved one business analyst, the level of cost and complexity to the project was very low.

In addition to the criteria above, projects that have the following characteristics can also be expedited:

- **Academic Innovation**
  Individual or groups of faculty members who wish to implement a new system or technology in the classroom for academic innovation can request for their request to be expedited. These projects typically have tight timelines and expediting is required so students can feel the full impact of academic innovation in their learning. Academic innovation pilot programs are also good candidates for expediting.

**Apple TV Pilot** - ETM and CIS worked together to deploy and pilot Apple TV’s in several SPU classrooms. The pilot program allowed faculty to test the use of iPads and Apple TV’s as a tool in new ”un-tethered” teaching pedagogies.

- **Strategic Imperative**
  A strategic imperative will come from university leadership and will align with an overall strategic goal of the university. Strategic imperatives can have tight timelines and can force a project to be expedited into the implementation stage.

**Digital Signage** - The VP of Enrollment Management & Marketing, in conjunction with the VP of Student Life, would like to research digital signage solutions with the goal to implement a small number of signs and grow that number in the future. The project is neither low in cost or complexity, but the timeline and the mandate forced this project to be expedited.

- **Imminent External Imperative**
  Imperatives from outside the university with an imminent timeline will often force a project to be expedited. These can come in the form of new regulations or other external environmental factors.

**Enterprise MFA** - The environment in modern technology and communications of phishing scams have affected SPU’s operations and bottom line. Enterprise MFA can help protect the university and its stakeholders from unauthorized access to SPU accounts. While the project is complex, the external pressure of phishing scams forces us to do something and implement MFA to mitigate this risk.

**Definition**

Studies have shown that properly defined projects are more likely to succeed and be completed on time and on budget. The primary focus of the IT project intake process is to properly define projects in writing so that every member of the project team and any interested stakeholders are on the same page. Projects are defined through a document called a *Project Charter*. The charter is a collaborative document, which will be written by all members of the project team. The CIS staff member working with you on your project intake will guide and assist the project team with the writing of the project charter.

**Click here to read the Project Charter wiki article.**

Note: The project charter’s signature section should be left blank until after prioritization & scheduling.

**Prioritization**

While the number of potential projects are limitless, the amount of resources (money, time, expertise) available to the university, CIS, and other departments are always limited. Evaluation and prioritization allows CIS, in partnership with other departments and a university-wide advisory council to analyze the pending project requests and move forward with the projects that are most beneficial to the university. These groups will evaluate and prioritize projects on a regular basis throughout the calendar year.
At the end of the evaluation and prioritization stages, projects can enter one of the following statuses:

- **Accepted** - These projects will be scheduled to begin implementation, usually within the next 90 days.
- **Expedited** - Similar to accepted, this status is used for projects that were expedited through the intake process.
- **Deferred** - Projects that are deferred require additional work of some kind before moving forward. Deferred projects can be placed back in the prioritization queue when outstanding action items related to the project are completed.
- **Closed** - The project is canceled.

Projects that remain in the prioritization stage will be re-evaluated and re-prioritized during the next prioritization cycle. Click here to view a list of projects currently awaiting prioritization.

The currently scheduled meetings for 2019 (as of 1/23/19) will occur on:

- March 12, 2019
- May 14, 2019
- July 9, 2019
- September 10, 2019
- November 12, 2019

**Scheduling**

After projects are accepted or expedited, CIS will work the project team and immediate stakeholders to schedule the project's implementation. Project scheduling is dependent on the current and planned workloads. We will work with every department involved in every project to ensure that projects are scheduled for work so that members of the project team are available for the project.

Click here to view a list of projects that have been accepted and are awaiting scheduling or implementation.

Click here to view a list of projects that are currently ongoing.

**Signatures & Kick-Off**

Part of the **project charter** is a section containing the signatures of the project sponsor, project owner, and the director-level supervisors of the project team. These signatures signify the acceptance of the project plan and commitment to start and finish the project with the resources required by the project plan.

Once the project has been accepted or expedited and scheduled, the project charter's timeline section should be updated. The charter can then be finalized and passed to each director, the project owner, and the project sponsor for signatory approval.