IST Project Intake

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Please replace the sample Latin with the contents of your submission

# Project Title

Instructions: The **IST Project Intake form** is modeled after the **University IT Governance Investment Proposal form**. It is the first stage of an Internal IT project, though may proceed to IT Governance should the scope be deemed significant (defined as more than 20 days IST effort, more than $20,000 of costs or that touches our core network).

All work that IST does is either operational or project based. This form helps articulate any non-operational work so that it can be assessed, approved, and ultimately brought to completion.

This form will communicate the high-level concept for the project to the approvers.. It does not need to be detailed, but should give enough information that the approvers understand the outcomes and impact of what is being proposed.

The process:

1. In conversations with peers and your manager, complete all parts of this form. The Architecture team and PMO can assist.
2. The supporting manager will submit the project to the manager of the area who would do the bulk of the work, or who own the affected systems or services.
3. The owning manager will assess and approve – if it is in their prevue – or move it on to the appropriate process, be that product council, EITAC or IT Governance. This process is documented [xxxxx]

If you have any questions please contact Terry Bunio at [terry.bunio@umanitoba.ca](mailto:) or 474-9298. We regularly help people navigate this process.

\*\* This help text is marked as **hidden text**. You can hide this by clicking on the ¶ in the Home Ribbon or by simply deleting it.

|  |  |  |  |
| --- | --- | --- | --- |
| Created By | **Your Name** | Date | **Submit Date** |
| Supporting Manager | **Manager Name** | Team | **Faculty Name** |
| Owning Manager | **Manager Name** |  |  |
| Approval Level | Choose an item. |  |  |

# Part 1: Executive Summary

What is being proposed, the costs and benefits. [250 Words]

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# Part 2: Proposal Narrative

## Problem, Need & Impact

Describe the problem or need that is being addressed and the impact to the University community. Consider things like why it is needed now; what is changing and what is not changing; how people’s life or experience of the institution will be different; what success looks like. It may be helpful think about the question “wouldn’t it be great if…”. [200 Words]

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## Architectural and Strategic Aligment

How does this enable the University, department or unit strategic plans? How specifically will it fulfill or enable any departmental or unit mandate? [1-3 sentences]

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## Constraints

What do we need to organize this project around. What will help focus the delivery and creativity. Things like critical dates, availability, money, regulations, things that must (or must not) change. [3-5 bullets].

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## Consequence of Not Proceeding

Add a description of what happens if this initiative is not pursued. What opportunities are missed? Impact on future projects? What services are impacted? Etc. [100 words]

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# Part 3: Assessment

## Technical Commentary

Technical comments provided by IST about the feasibility of the proposal, any high level architectural considerations, and any obvious technical risks or benefits. (100 words)

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## Cost Estimates

Cost estimates are high level and consider a 3 year Total Cost of Ownership.

In consultation with IST, provide high level estimates. For staffing, it is important to include any staff that would be working on the project - even if there is no incremental cost – so that the full cost (even internal) of the project can be understood. It is also important to consider backfill of positions for larger, longer term projects. This is a three year total cost of ownership estimate which means consider all costs over 3 years. Use the financial estimating spreadsheet for help.

3 Year External Project Costs

Hardware $99,999

Software Licenses/Subscriptions $99,999

Maintenance Costs Year 2 and 3 $99,999

Consulting Services @ 99 Hours $99,999

**Total External Costs $99,999**

3 Year Internal Project Costs

IST Staff @ 99 Hours $99,999

Dept. Staff @ 99 Hours $99,999

**Total Internal staff Costs $99,999**

**Total Project Cost $99,999**

Annual External Ongoing Costs

Software Licenses/Subscriptions $99,999

Consulting Services $99,999

**Total Annual External Ongoing Costs $99,999**

Annual Internal Ongoing Costs

IST Staff @ 99 Hours $99,999

Dept. Staff @ 99 Hours $99,999

**Total Annual Internal Ongoing Costs $99,999**

\_\_\_\_\_\_\_

### Financial Commentary

Provide some commentary on costs of the project and the 3 year total cost of ownership to explain at a high level the impact of the project. [100 words]

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### Funding Source

List all funding sources and the funding amounts as available. If funding has not yet been secured, indicate that funding is required. [one statement]

Fully funded by the department. [or Funding Required.]

If fully funded, please provide:

|  |  |
| --- | --- |
| Funding Unit | Choose an item. |
| Funding Type | Choose an item. |
| FOAP |  |

## Quantifiable Benefit

Thinking about measurable benefits is important when considering an investment. Benefits can be moving staff to higher value work, measurable improvement in speed of processing, enhanced experience by clients. There are lots of ways to define measurable. Provide 2-5 things that can be measured to help assess success and ensure we are focused on the right thing. [Bullets]

* Benefit 1
* Benefit 2
* Benefit 3

Key Milestones

List the major waypoints or gates for the project. Make assumptions about when they need to happen and indicate if there are critical dates that must be met. This can be specific as a date or as general as a “third quarter”. [3-5 Bullets]

* Milestone 1
* Milestone 2
* Milestone 3

Team

Define the core team that would likely be required to complete this work. Include commitment required if known. [Bullets]

* Team Member Name, Role, 50%
* Team Member Name, Role, 10%
* Team Member Name, Role, 80%

### Project Management

Describe the project management that is required and who would fill the role of project manager. Add commentary if required.

|  |  |
| --- | --- |
| Project Management Effort | Minimal |
| Project Management By | Team Member |

Categorization

Define the classification and portfolio. Most internal IT projects will be classified as OPERATIONAL and in the IT OPERATIONAL portfolio. For questions contact the PMO

|  |  |  |
| --- | --- | --- |
| Classification | Operational |  |
| Portfolio | IT Operational |  |

Approval

Record the approvals for this proposal including the history of when it was presented and reviewed.

Reviewed By Name, Role/Position

Name, Role/Position

Approved By By Owning Manager on Date OR

By Product Council in minutes on date OR

By EITAC in Minutes on date

### Approval History

Brief synopsis of the review and version history of the document.

26 June 2018 Document Created  
29 June 2018 Manager Approval  
5 July 2018 Presented to EITAC

10 Aug2018 Approved by EITAC