

IT Project Intake Form and Annual Planning Interface

Type of Request/ Submission	Unit-Level Request	Operational Optimization (OO)	Strategic Initiative (SI)
Examples	○ Requests for new automated reports ○ Requests for specific platforms, including implementation of Ellucian modules (promote business processes, improvements)	○ Implementation of new product that will promote effectiveness, capture efficiencies (at institutional or program level) (e.g., ID card scanners to track student usage)	○ Technology is a resource needed to implement a larger SI
Required Actions (Planning Stages) Timing of Submission	○ Submit IT Project Intake Form at any time (reviewed every 3 months) ○ Meet with IT leadership regarding cost, feasibility, timing	○ Submit IT Project Intake Form by Thursday, September 17 ○ Meet with IT leadership prior to submission of OO, if needed ○ Attach IT Project Intake Form to OO	○ Submit IT Project Intake Form by Thursday, September 17 ○ Include IT in SI planning group prior to submission of SI ○ Once the SI is approved, submit a new IT Project Intake Form to get an updated quote
Purpose/Rationale	○ Communicate and promote awareness of needs ○ Link to EMP, TMP ○ Engage IT, prioritize requests, determine timing, incorporate into list	○ Ensures accurate and complete cost assessment ○ Provides opportunity for additional units to be included	○ Engages IT expertise after larger SI project is approved
Examples of Different Path	○ Implementation of an institutional project (beyond unit needs) ○ Resource needed to implement larger SI	○ As an OO, the submission pertains to Goal 4 of the EMP ○ Submissions pertaining to other EMP goals should be made via SI process	○ To explore technology-related options for a future SI or OO proposal, form a collaborative workgroup and then submit an IT Project Intake Form (at any time)