

Project Plan Template



Project Details

Project Name: Business Intelligence (BI) Needs Assessment
 Project Team Leads: Guangming Du and Mike Noel
 Project Manager: Rebekah Ahrens
 TeamDynamix Project Number: 241117

Project Overview (What is going to be accomplished)

A high-level Business Intelligence (BI) needs assessment will be conducted with Executive and Senior-level campus leaders to determine what information they need for strategic, tactical, and operational decision-making. The assessment will consist of an hour-long interview with key campus stakeholders (Appendix A) and an interview selected from OneIT BI team members. The BI needs assessment will focus on the critical Financial, HR, Academic, and Research Administration information needs (Appendix B).

Based on the interview responses, the OneIT BI team will identify the important and common themes across the university, capture information needs, and determine any information gaps that need to be resolved. These themes will be used in future BI planning and prioritization process.

Project Staffing (Who will perform the work)

Team Member	Role, Skill Set	Estimated Time Commitment (hrs)
<i>Chris Fomon</i>	<i>Business Analyst</i>	<i>20</i>
<i>Hans Hoerschelman</i>	<i>Business Analyst, Interviewer</i>	<i>75</i>
<i>Sara Novotny</i>	<i>Business Analyst, Interviewer</i>	<i>75</i>
<i>Warren Staal</i>	<i>Business Analyst</i>	<i>20</i>
<i>David Thole</i>	<i>Business Analyst, Interviewer</i>	<i>75</i>
<i>Brenda Ulin</i>	<i>Business Analyst, Interviewer</i>	<i>150</i>
<i>Kris Yows</i>	<i>Business Analyst, Interviewer</i>	<i>150</i>
<i>Guangming Du</i>	<i>Business Analyst</i>	<i>50</i>
<i>Mike Noel</i>	<i>Business Analyst</i>	<i>50</i>
Total		665

Additional administrative resources will be required to do actual scheduling.
 Additional communication manager resources maybe needed to review final report and presentation.

Project Schedule (When will the work be started/completed)

A detailed project schedule is available in our team’s Sharepoint Site.

Milestone	Target	Status
Develop interview plan, questions, communications and process	6/29/2015	Complete

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Pilot Needs Assessment Interview process with a few friendly stakeholders	7/13/2015	Complete
Conduct BI Needs Assessment Interviews with remaining stakeholders	9/23/2015	Pending
Final Analysis, Report and Presentations	9/30/2015	

Project Budget

The budget includes the staffing time only. No additional budget is necessary.

Needs Assessment Interview Planning –

 Sub-team meetings and overall review – ~150 hrs

Interviews –

 30 Interviews * 3 interviewers * 3hrs = 270 hrs

Analysis -

 Review, analysis, reporting writing, presentation – 225 hrs

Total Staff Hours = 665

Total Cost = \$43,225

Change Control Plan (What is the process for managing change)

Substantial changes to project scope will be brought to the OneIT Steering Committee for evaluation and resolution.

Communications Plan (How will information be communicated)

Target Audience	Primary Contact	Communication Mechanism	Frequency	Purpose/Description of Communication	Author/Owner
Key Campus Stakeholders (Executive and Senior-level Leaders)	Steve Fleagle, OneIT BI Interview Team	Email, meeting discussion	Intro email, post-interview email follow, post-assessment key themes email	Introduce the project, Interview follow up appreciation, Key theme sharing	OneIT BI Team
OneIT Steering Committee	OneIT BI Team	Email, meeting discussion	Monthly, ad hoc as needed	Updates on project, feedback	
Project Team	N/A				
OneIT Leaders	OneIT BI Team				
ITADmin Community	Jessica Church				
Web Community	Mark Ahrens				
IDUG	Brenda Ulin	Presentation	August/October	Provide background and results from analysis	Mike Noel
<i>List Additional ...</i>					

Risk Management Plan

Risk Number	Risk Description	Likelihood (H,M,L)	Impact (H,M,L)	Mitigation Strategy
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1	Performing the needs assessment sets false expectations that we will be able to provide solutions to all of the opportunities and gaps identified.	M	H	Set clear expectations before, during, and after each interview.
2	Ability to schedule and interview all key stakeholders Identified during the late summer months	M	M	Extend project timeline to accommodate key stakeholder schedules

Issue Tracking and Resolution Plan

Issue tracking is found in our Sharepoint team site.

Metrics / Key Performance Indicators

Schedule:

Schedule 2-3 key stakeholders each week through August
 Completion by September 30, 2015

Value:

Interview 10 or more units.
 Identify 5 clear opportunities for improving BI on campus.

<input type="checkbox"/>	Project Plan Approval Date	MM/DD/YY
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Appendix A

BI Needs Assessment

Executive and Senior-level University Staff Interview List

- Rod Lehnertz - Interim Senior Vice President
- Kevin Ward - Interim Vice President, Human Resources
- Don Guckert - Associate Vice President and Director, Facilities Management
- Debby Zumbach - Interim Assistant Vice President and Director, Business Services
- Susan Klatt - Director, Financial Management and Budget and University Secretary
- Terry Johnson - Interim- University Chief Financial Officer and Treasurer
- Cheryl Reardon - Senior Assistant Vice President, Research Administration
- Jennifer Lassner - Assistant Vice President for Research/Director Sponsored Programs
- Georgina Dodge - Chief Diversity Officer and Associate Vice President
- Lon Moeller - Associate Provost for Undergraduate Education and Dean of the University College
- John Keller - Associate Provost for Graduate Education and Dean of the Graduate College
- Kevin Kregel - Associate Provost for Faculty
- Linda Snetselaar - Associate Provost for Outreach and Engagement
- Downing Thomas - Associate Provost and Dean of International Programs
- Chet Rzonca - Associate Provost and Dean of Continuing Education
- Brent Gage - Associate Vice President for Enrollment Management
- Don Szeszycki - Associate Vice President and Director of Administration and Planning
- Steve Fleagle - CIO and Director, ITS
- Sarah Gardial - Dean, Tippie College of Business
- David Johnsen - Dean, College of Dentistry
- Nicholas Colangelo - Dean, College of Education
- Alec Scranton - Dean, College of Engineering
- Gail Agrawal - Dean, College of Law
- Chaden Djalali - Dean, College of Liberal Arts and Sciences
- Debra Schwinn - Dean, Carver College of Medicine
- Rita Frantz - Dean, College of Nursing
- Donald Letendre - Dean, College of Pharmacy
- Susan Curry - Dean, College of Public Health

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Appendix B BI Needs Assessment Interview Questions

1. From a strategic perspective, what information and metrics are most critical to your planning processes?
 - a. In what form do you get that information? (spreadsheet, report, application, dashboard)
2. From a tactical/operational perspective, what information and metrics are most critical to your daily operations?
 - a. In what form do you get information? (spreadsheet, report, application, dashboard)
3. In your role as _____(fill in the blank), what are the questions that you ask, and what information needs do those questions drive?
 - a. What information do you request internally from those that report to you?
 - b. What information do you request from other units across campus, or external to campus?
4. In your role as _____(fill in the blank), what are the questions that you are asked, and what information needs do those questions drive?
 - a. What information do you provide to your administration/management?
 - b. What information do you provide to other units across campus, students, or external to campus?
5. From a student/academic/faculty perspective, what information is most important?
 - a. How frequently would you like student/academic information (live, day old, weekly, monthly, semester, fiscal year)?
6. From a financial perspective, what information is most important?
 - a. How frequently would you like financial information (live, day old, weekly, monthly, semester, fiscal year)?
7. From a human resources perspective, what information is most important?
 - a. How frequently would you like human resources information (live, day old, weekly, monthly, semester, fiscal year)?
8. From a research administration perspective, what information is most important?
 - a. How frequently would you like research administration information (live, day old, weekly, monthly, semester, fiscal year)?
9. Is there any information that is difficult to obtain or simply not available, or exists but requires re-analysis, re-formatting or redefining due to unique business rules?
10. What type of reports, dashboards, and visualizations would you like, that you don't currently have?
11. A lot of information is provided centrally but each college/unit usually captures additional supplemental data locally. Does your college/unit integrate any locally managed data with existing institutional data to meet your information needs?

Wrap up of Interview Questions

12. From your interactions with your peers at meetings or conferences, do you have any examples of business intelligence solutions that you think we should be aware of?

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13. Is there anything else with regard to institutional data, business intelligence and analysis that you want to share with us?