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)

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

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.

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Target</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop interview plan, questions, communications and process</td>
<td>6/29/2015</td>
<td>Complete</td>
</tr>
</tbody>
</table>
Project Plan Template

<table>
<thead>
<tr>
<th>Pilot Needs Assessment Interview process with a few friendly stakeholders</th>
<th>7/13/2015</th>
<th>Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct BI Needs Assessment Interviews with remaining stakeholders</td>
<td>9/23/2015</td>
<td>Pending</td>
</tr>
<tr>
<td>Final Analysis, Report and Presentations</td>
<td>9/30/2015</td>
<td></td>
</tr>
</tbody>
</table>

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)

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

Risk Management Plan

<table>
<thead>
<tr>
<th>Risk Number</th>
<th>Risk Description</th>
<th>Likelihood (H,M,L)</th>
<th>Impact (H,M,L)</th>
<th>Mitigation Strategy</th>
</tr>
</thead>
</table>

4/13/2016 - BI Needs Assessment - DRAFT
Performing the needs assessment sets false expectations that we will be able to provide solutions to all of the opportunities and gaps identified.

Ability to schedule and interview all key stakeholders identified during the late summer months.

Set clear expectations before, during, and after each interview.

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.

☐ Project Plan Approval Date

MM/DD/YY
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 Szestycki - 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
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?
13. Is there anything else with regard to institutional data, business intelligence and analysis that you want to share with us?