ITCRB FY19 Funding Cycle Kickoff

Sept 14, 2017
ITCRB FY19 Funding Cycle Calendar

Proposer Activities

9/14 – Templates Available
9/29 – Intent to Submit Due
12/1 – Proposal Due w/Reviews and 3 Year Strategic Goals
12/11 – Revised Proposal Due
01/9-11 – PRC Meeting
02/27-2/28 – ITCRB Meeting
~4/15 – Decision Notifications

PRC & ITCRB Activities
## Timeline for FY19 ITCRB Funding Proposals

<table>
<thead>
<tr>
<th>ITCRB Activity</th>
<th>2017 September</th>
<th>2017 October</th>
<th>2017 November</th>
<th>2017 December</th>
<th>2018 January</th>
<th>2018 February</th>
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<tbody>
<tr>
<td>1. FY19 Funding Kickoff: Review proposal templates, requirements, and timeline</td>
<td>9/14</td>
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<td>2. Intent to Submit Due</td>
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<td>3. Benefits Writing Workshop</td>
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<td>4. Change Management Workshop</td>
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<td>5. Quality Review Kickoff Session</td>
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<td>10/24</td>
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<td>6. Organizational Impact Advisory Meetings: Presentation is based on primary functional area impact</td>
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<td>10/30-11/14</td>
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<td>FAS Change Management Cmt: 10/30 – All proposals</td>
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<td>Fin Deans 11/02 – Finance impact</td>
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<td>CIO Council 11/13 – IT impact</td>
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<td>HR Deans 11/14 – HR impact</td>
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<td>7. Proposals Due to PMO for Review with 3 Year Strategic Goals</td>
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<td>8. Revised Proposals Due</td>
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<td>9. PRC Meeting</td>
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<td>10. PRC Feedback Due to PMs</td>
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<td>11. Final Proposals Due</td>
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<td>12. ITCRB Meeting</td>
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<td>2/27-2/28</td>
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# October Activity Details

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<th>Activity</th>
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| Mentor Assignment (NEW)                                       | • Each Intent to Submit will be assigned a HUIT PMO member to advise and coach submitters  
• Mentor will help submitter to navigate the process                                                                                                    |
| Benefits Writing Workshop                                    | • Session will have both training and well as being a working session to help submitters write clear, strong, user-focused benefits statements  
• Offered previously – will be mandatory                                                                                                               |
| Change Management Workshop (NEW)                             | • Training session to educate submitters about HUIT’s change management processes and how to plan for change management in your project proposal  
• Will be mandatory                                                                                                                                       |
| Project Budget Spreadsheet Training (NEW)                    | • Training on the use of the new project budget spreadsheet.  
• 10/10 ITCRB PM meeting @noon                                                                                                                                                      |
| Quality Review Kickoff – ‘Speed Dating’ (NEW)                | • Session where all potential projects will present summaries to the quality reviewers so that any necessary additional interviews can be identified and scheduled.                                               |
Template Changes

• Proposal template
  – Adding governance and change management sections
  – ROI calculation replaced with measurable benefit list
  – Sponsor must commit to benefits as part of proposal approval

• Updated project budget spreadsheet
  – Single workbook that you will use for proposal through both fund releases
  – More automatic calculations
  – More dropdowns and other guidance to simplify classifications for spending

• Quality Reviews
  – Same questionnaires as last year but new process to reduce the number of review meetings

• New guidance for operating tails
  – Clarification about responsibility for operating tail if no additional funding approved
  – Requirement to refine operating tail estimate each year
  – Specification of process to get operating tail approved at end of project

• Organizational Impact
  – Proposal package and ballot essentially the same – work with your mentor
  – New package for projects seeking implementation fund release – more details to follow
Change Management Workshop - New

- 2-hour workshop on organizational change management
- Will discuss the HUIT change management framework
- Will have workshop time to think about how your project will include a change management approach
- Will distribute a short change management assessment tool that PM will complete and submit as part of the proposal
- Your mentor can help you complete the assessment tool and give guidance
ServiceNow (Snow)

• Proposals entered in Demand module
  – Simplified Demand form
  – NEW: Specification of schools that will be affected by project

• 3 Year Strategic Goals and Roadmaps in SNow
  – Generate roadmap Gantt from Qlik
  – All planned projects must have estimated cost (continue to use $1m, $3m, $5m, $10m ballpark if no better estimate of cost available)

• Updated instructions now available
  – Intent to Submit
  – Entering roadmap of potential projects

• Use of OneDrive linked to ServiceNow for proposal materials will continue
Resources on PMO Site

• Proposal Submission Templates (https://pmo.huit.harvard.edu/annual-award-process)
  – Proposal Template
  – Project Budget Spreadsheet
  – Organizational Impact forms
  – 3 Year Strategic Goals
  – Operating Tail guidance

• ServiceNow Instructions (https://pmo.huit.harvard.edu/servicenow-ppm)
  – Intent to Submit
  – Roadmaps