ITCRB FY20 Funding Cycle Kickoff

Sept 11, 2018
FY20 ITCRB Process Team

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Agenda

• FY20 ITCRB Funding

• Finalized ITCRB FY20 Funding Cycle Timeline

• Intent to Submit

• Proposal Templates

• Budget Template

• Overall FY20 Process Changes
FY20 ITCRB Funding
Overall Highlights

• Financial pressures driven by the endowment and other higher education constraints will continue to affect ITCRB funding.

• The EVP has guided the following for FY20:
  – **ITCRB Funding**: Between $15M - $19M, with a request to characterize what can be done with $15M funding (i.e., absolutely necessary) and what would subsequently be added to reach $19M. The $19M ceiling is the result of the previous funding cycle exceeding the cap (FY19 awards of $21.1M versus a $20M ceiling).

• Including FY19 project awards, FY20 estimate for active projects is $10.2M.

• Between $4.8M and $8.8M funding will be available for new projects in FY20.

• The ITCRB has established a "Small Ask" fund of $200,000 for FY19.
Calendar and Timeline
ITCRB FY20 Funding Cycle Calendar

Proposer Activities

9/11 – Templates Available

9/28 – Intent to Submit Due

12/3 – Proposal Due w/Reviews and 3 Year Strategic Plan

12/10 – Revised Proposal Due

01/9-10 – PRC Meeting

02/26-28 – ITCRB Meeting

April – Decision Notifications

PRC & ITCRB Activities
# Timeline for FY20 ITCRB Funding Proposals

<table>
<thead>
<tr>
<th>ITCRB Activity</th>
<th>2018 September</th>
<th>2018 October</th>
<th>2018 November</th>
<th>2018 December</th>
<th>2019 January</th>
<th>2019 February</th>
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<tbody>
<tr>
<td>1. FY20 Funding Kickoff: Review proposal templates and timeline</td>
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<td>2. Intent to Submit Due</td>
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<td>3. Proposers-PMO Monthly Meeting</td>
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<td>4. Budget Spreadsheet Workshop</td>
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<td>5. Change Management Workshop</td>
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<td>6. Benefit Writing Workshop</td>
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<td>7. Quality Review Kickoff Session</td>
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<td>8. Organizational Impact Advisory Meetings:</td>
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<td>10/29-12/06</td>
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<td>FAS Change Management Cmt: TBD – All proposals</td>
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<td>HR Deans</td>
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<td>Fin Deans</td>
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<td>9. Proposers-PMO Monthly Meeting</td>
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<td>10. Proposals Due to PMO for Review with 3 Year Strategic Goals</td>
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<td>11. Proposers-PMO Monthly Meeting</td>
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<td>12. Revised Proposals Due</td>
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<td>13. Proposers-PMO Monthly Meeting</td>
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<td>14. PRC Meeting</td>
<td>1/9-1/10</td>
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<td>15. PRC Feedback Due to Proposers</td>
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<td>16. Final Proposals Due</td>
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<td>17. Proposers-PMO Monthly Meeting</td>
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<td>18. ITCRB Meeting</td>
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Upcoming Deadline: Intent to Submit
Intent to Submit

What is Intent to Submit?

Intent to Submit is how proposers formally initiate an ITCRB proposal for the coming funding cycle.

How do I do it?

Create a Demand in ServiceNow. Log in with HarvardKey to https://harvard.service-now.com/navpage.do

Are instructions available?

A job aid is available on the PMO website:

Who can I ask for help?

Ellen Landsman
ellen_landsman@harvard.edu
617-496-2237
Proposal Template
Changes to the Proposal Template

• All existing proposal template elements remain for the next year
• The proposal template is organized into three large content areas:
  – Project Value
  – Project Viability
  – Project Management
• Proposal template elements are reordered into a logical sequence that facilitates both reading and writing, and reduces repetition
• Proposal question text is revised for clarity
• Inline guidance is expanded, includes more links to pertinent documentation and job aids, and is clearly designated in yellow text boxes
• The last page of the proposal template contains a process and deliverable checklist (later to be expanded into a handbook)

The FY20 proposal template is available on the PMO website:
https://pmo.huit.harvard.edu/files/huit-pmo-1/files/fy20_itcrb_proposal_template.docx
Budget Template
Changes to the Budget Template

• Employee and Contractor Roles are combined into one tab
  – Contractor rates reflect average Yoh rate

• Projects are now participating in the computer asset model
  – HUIT uses a per-FTE allocation, managed centrally by HUIT Administration, to fund standard departmental equipment
  – HUIT Administration will deploy & manage computer equipment for project resources

Reminders/Tips:

• Fill in the Summary Tab first
  – Start & end dates on the summary tab determine drop-downs for the adjacent tabs

• Fill in each row from left to right

The FY20 proposal budget template is available on the PMO website.
Overall ITCRB Process
Overall ITCRB Process Updates

• Documentation
  – PMO will ensure that all proposer and project manager resources are available and discoverable on the PMO website

• Quality Reviews
  – Proposers will be assigned a specific time slot, but are welcome to attend the entire Quality Review “Speed Dating” meeting if they choose to do so
  – Interested parties (such as ITS) are invited to the Quality Review “Speed Dating” for information sharing, but will not conduct in-depth Quality Reviews for the ITCRB proposal
  – PMO will draft standard intake forms for follow-up Quality Review meetings
  – PMO will draft standard output forms for reporting Quality Review results to the PRC and ITCRB

• Change Management
  – PMO will ensure that the change management assessment tool scores are consistent

• Organizational Impact
  – Meetings and scoring will be the same format as last year, but the PMO will draft an easier-to-use template for proposers to report on results of Organizational Impact meetings
Project Manager Support

• If you have questions:
  – Email HUITPMO@Harvard.edu to ask your question or schedule office hours

• Resources for proposers:
  – HUIT PMO website https://pmo.huit.harvard.edu
  – Proposal Preparation Checklist at the end of the proposal template
    https://pmo.huit.harvard.edu/files/huit-pmo-1/files/fy20_itcrb_proposal_template.docx
Appendix
Full Proposal Process
The proposal preparation checklist has been removed from the end of this kickoff deck and published separately on the HUIT PMO website.

The most up-to-date FY20 proposal preparation checklist is always available at https://pmo.huit.harvard.edu/annual-award-process, Templates tab.