Project assessment process

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Overview

- A new project proposal is assessed in the stages below, using a standard template (see separate document). The template includes prompts for discussion and guidelines for evaluation.
- Scheduled monthly meetings, engaging with key customers in the Department, are a important part of the assessment process. There are two series of customer group meetings:
  - Teaching Office - the remit of these meetings covers student- and teaching-related matters in general, including the GSO and other graduate-level courses.
  - Departmental administration - these meetings cover the Research and Finance Office, HR and Facilities.
- These groupings reflect the main sources of project proposals handled by ITSD, and the small number of groups allows each to have a reasonable view of the wider context of its needs and proposals.
- The routine attendance at customer group meetings is small, with additional attendance as required for discussion of specific projects and proposals.
- The bullet points in bold below refer to the sections of the project assessment template being completed at each stage.

Customer group meeting

- All proposals are initially considered by a customer group meeting as part of its regular business. Requests from individuals or offices are discussed informally and referred to the next meeting of the appropriate customer group.
- The discussion at this meeting should establish a full understanding of a project and its potential benefits, as well as its wider context and the importance attached to it by the customer group. A proposed outline solution will be discussed and agreed.
- For each project, the customer group appoints a customer lead who will champion the project.
- Brief notes of decisions and actions are produced for these meetings.
- There may be further discussion with some or all of the customer group in order to gather the information needed for the evaluation meeting.
- **Key information, aims; drivers; dependencies; baseline; risks; benefits; proposed outline solution**

Evaluation meeting

- The costs and benefits of the project are estimated.
- The costs and benefits of the baseline alternative(s) are estimated.
- The project as proposed is evaluated, setting the costs and benefits alongside the risks and other factors, and in comparison with the baseline alternative(s).
- There is an assessment of the potential for splitting the project into phases.
- The conclusion for each proposal is to accept, reject, or propose a phased or amended version.
- The conclusion and the proposed approach are reported back to the customer group. There may be further rounds of discussion and evaluation as needed.
- **Risks; benefits; proposed outline solution; costs; baseline comparison; alternatives; phases**

What happens next

- Once a project is accepted, it is handled as part of the ongoing prioritisation and management process:
  - The project is ranked against other projects waiting, and is added to the queue.
  - Accepted projects are not initially scheduled, unless they have an inherent schedule/deadline
  - Projects in the queue are scheduled as resources become available, and according to their ranking in the queue.