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 an 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.