Angelo State University

Campus-wide
Project Management Software
Business Justification

Project Name:	Project Management Software Implementation
Proposed By:	Jackie Droll & John Russell
Department Head/Director/Dean:	Brian Braden
Approving VP*:	Doug Fox
Date Submitted:	1/12/09

*Approving VP or Associate VP

Business Justification Approval Process

Project Overview

1. Problem Statement

Describe in detail the business issue.

Since the close of the Portico Project in December of 2006, the Project Office has continued to manage the planning, monitoring and controlling of the implementation of many technology-related projects for the ASU campus. Due to the increase in project requests and the number of projects being implemented concurrently, we are looking for ways to streamline, automate our processes and create a more efficient data compilation model to assess the complexity, risk, alignment with university goals, impact to the university, budget implication, and expected resource requirements for competing projects so that projects can be selected and prioritized accordingly. This selection and prioritization of projects, or *balancing of the Portfolio*, will give project managers the time required to plan projects appropriately to ensure a successful and cost effective implementation.

We have learned from the construction industry that for every hour spent during the planning of a project you will save 10 hours during implementation and 100 hours after go-live, which has the potential to translate into substantial cost savings for ASU.
The ASU Facilities Planning & Construction Office realizes the need for a standardized and structured methodology to implement projects as well. John Russell, Facilities Planning & Construction Director has been working with the Technology Project Office to find a solution that provides a more efficient way to facilitate the planning, procurement, tracking, implementation, managing construction costs, and reporting of construction projects. Other offices on campus have also discussed needs for project management software to help them manage departmental projects.

During 2007, the Project Management Institute (PMI) stated that 75% of projects fail. House Bill 1789 was passed in September 2007 to help close the gap on failed projects. It mandated that all state agencies in Texas, including higher education agencies, create and follow project management guidelines for all technology-related projects. We have been working with the Texas Tech University System concerning project and portfolio management standardization and guidelines across all universities within the system since the passing of HB 1789. We have successfully completed many projects during the past two years using our standardized methodology, but as we continue to grow and project management becomes part of ASU's daily operations, we need a tool that will allow us to replicate our methodology and extend it to others needing to manage projects.

The Project Office currently uses an Excel Spreadsheet to track Technology Related projects. The spreadsheet contains approximately 120 technology related projects, each showing current project status and % complete. It also contains details of the classification, risk level, and impact of each project. This spreadsheet is used to provide weekly updates to the IT Project Office website Project Portfolio. Facilities Planning and Construction is also using a spreadsheet system to manage their projects in a similar fashion.   Although the spreadsheet is shared and can be updated by several people at one time, it is becoming very cumbersome to keep the spreadsheet updated. Detailed project task tracking is maintained within a separate spreadsheet for each project. There is also no way to continuously monitor the resources for each project using the spreadsheet methodology with our current resources. Although resource utilization is a very important factor when determining which projects are the right projects to do, at this time we are unable to track the human resource component or fiscal resources of each project within the spreadsheet.
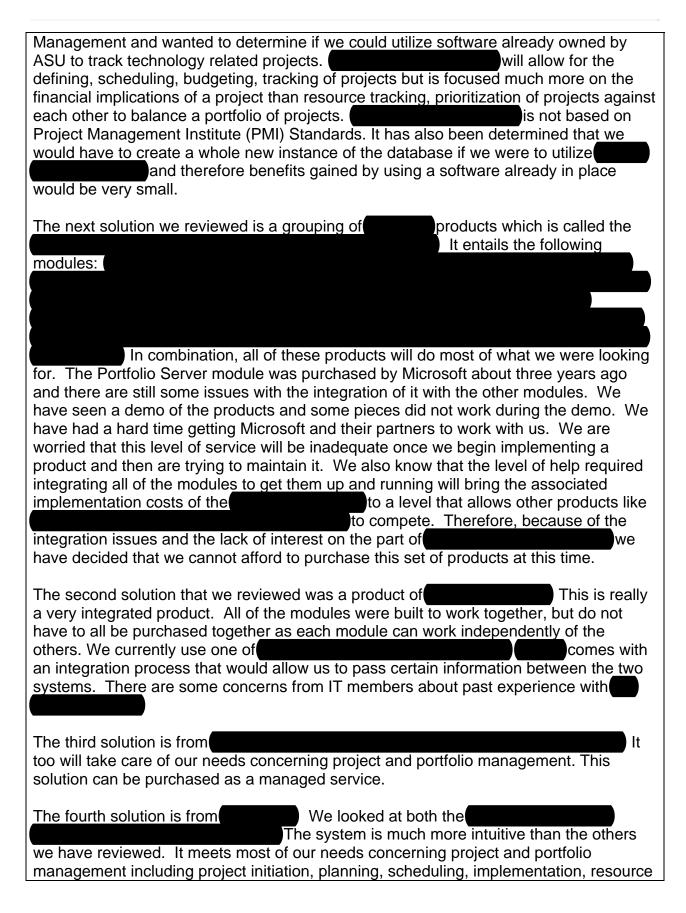
The Project Office and Facilities Planning and Construction feel that we have the many components needed to perform Portfolio Management, however, due to the information being in a spreadsheet, we are unable to chart and graph our current portfolio and then choose future projects based on these charts and graphs to keep it balanced. We foresee many new projects being added to the list, making the upkeep a very time consuming process. We have outgrown our current solution and are ready to move to an off the shelf solution that fits our business needs.

2. Possible Solutions

Describe the possible solutions you have reviewed to resolve the business issue. If you have already chosen a particular solution, please explain why it was selected over the other solutions you are listing.

As we started our search for solutions, we reviewed Gartner's magic quadrant for the Project and Portfolio Management software solutions. Top performers included ███ For these performers to be included, they each had to support most of the nine areas described in the Project Management Body of Knowledge (PMBOK) from the Project Management Institute (PMI), present an integrated approach to the areas of resource, time and cost management. Another focus of these performers was Integration Management; looking across the project portfolio over time.   We also looked at a few other software solutions not inside the magic quadrant to ensure that we were looking at the right product combinations that would be the most sensible for us to move forward with.

We reviewed an Open Source software called██████████ It was soon determined that this software was not sophisticated enough to allow easy web entry of tasks for a particular project, nor could you roll all of your projects together to get a look at your portfolio of projects.

We also reviewed██████████████████ We currently use██████in Facilities

Management and wanted to determine if we could utilize software already owned by ASU to track technology related projects. ████████████████ will allow for the defining, scheduling, budgeting, tracking of projects but is focused much more on the financial implications of a project than resource tracking, prioritization of projects against each other to balance a portfolio of projects. ████████████████ is not based on Project Management Institute (PMI) Standards. It has also been determined that we would have to create a whole new instance of the database if we were to utilize█████ ██████████ and therefore benefits gained by using a software already in place would be very small.

The next solution we reviewed is a grouping of ████████ products which is called the ██ It entails the following modules: ██ ███ ███ ███ ████████████████ In combination, all of these products will do most of what we were looking for. The Portfolio Server module was purchased by Microsoft about three years ago and there are still some issues with the integration of it with the other modules. We have seen a demo of the products and some pieces did not work during the demo. We have had a hard time getting Microsoft and their partners to work with us. We are worried that this level of service will be inadequate once we begin implementing a product and then are trying to maintain it. We also know that the level of help required integrating all of the modules to get them up and running will bring the associated implementation costs of the████████████████ to a level that allows other products like ████████████████████████████████ to compete. Therefore, because of the integration issues and the lack of interest on the part of ██████████████████████ we have decided that we cannot afford to purchase this set of products at this time.

The second solution that we reviewed was a product of ████████████████ This is really a very integrated product. All of the modules were built to work together, but do not have to all be purchased together as each module can work independently of the others. We currently use one of ████████████████████████████████ comes with an integration process that would allow us to pass certain information between the two systems. There are some concerns from IT members about past experience with████ ████████████

The third solution is from ██ It too will take care of our needs concerning project and portfolio management. This solution can be purchased as a managed service.

The fourth solution is from ████████████ We looked at both the ████████████████ ████████████████████████ The system is much more intuitive than the others we have reviewed. It meets most of our needs concerning project and portfolio management including project initiation, planning, scheduling, implementation, resource

mgt, and dashboard reporting for executives. Jackie Droll and John Russell attended the ████████████ this past November to learn more about the product and conference attendees seemed very happy with the products and the support offered by ████████

Proposed Purchase
As ASU continues to move forward with its strategic planning, many offices will be looking for ways to increase process efficiencies by implementing new projects, as well as maintain transparency in their business endeavors. Departments will need to effectively manage their projects and at the same time give upper level management the ability to view these projects throughout their implementation to assess status as well as help determine which new projects could be taken on and the best time for their implementation (*portfolio Management*). By finding a software solution that fits the project and portfolio management needs of the ASU campus, we will create efficiencies of scale – giving ASU the ability to use the same tool across campus to decrease redundancy and increase efficiencies. After evaluating several project management software solutions, the Project Office along with the Facilities Planning & Construction Office has determined that the purchase and implementation of the ████████ project management software will best allow us to move forward with our Project and Portfolio Management strategies for technology-related projects and construction projects across the ASU campus. It seems to provide the best fit for ASU. The Texas Tech University System is currently looking at the ████████ tool as a possible solution for their Project and Portfolio management needs as well. We feel that the purchase of the ████████ project and portfolio management tool will be imperative for ASU's long term success concerning project and portfolio management of technology and construction-related projects and will be a great benefit to others across campus wanting to manage departmental projects.

3. Project Recommendation – Anticipated Project Scope and Outcomes

Describe the project that is being recommended to resolve the business issue.

Part A
Identify the type of project this would be.

Yes	No	Survey Question
X		Is this a new product installation?
	X	Will this add-on to an existing product(s) currently in use. If you selected 'Yes' please list the existing product(s):
X		Will there need to be an interface with any existing products currently in use? (i.e. Banner, OneCard, Famis, CashNet) If you selected 'Yes' please list the existing product(s): Project Office Web Site, CA's Service Desk , possibly Banner
	X	Is this project being mandated? If you selected 'Yes' please provide the date it is required to be implemented by in MM/DD/YY format and the entity who is mandating the project.
	X	Do you foresee any policy changes needing to take place to implement this project? If you selected 'Yes' please list the policy change(s):
X		If the implementation of this project will affect your current business processes, are your Business Process Analysis documents (BPA's) up to date? (Y/N/NA) Yes, we are working on them.

Explanation:

Part B
Include a description of the scope (what will and will not be included in this project) and anticipated outcomes (projected efficiencies, change in work load, benefits to stakeholders) of implementing of a project that specifically addresses the business issue.

We would like to pull all of our current project initiation, selection, prioritization; planning, solicitation, implementation, and close-out processes together to help us better manage and balance our current project portfolio. We see the tracking and task assignment for projects becoming more efficient and streamlined with easy access to the project files and status updates by all involved in each project via the web.
Phase I would include the rollout of the software to Information Technology and the Facilities Planning & Construction department.
Phase II would include the rollout of the software to other offices on campus.

Part C
When would you need this solution to be in place and functional? Please specify Month/Year

Phase I (Rollout to Project Office and Facilities Construction): September 2009
Phase II (Rollout to other offices on campus): TBD

4. Stakeholders who will benefit from the implementation of this Project.

Indicate who will benefit or have a stake in the outcome of this project. Describe in the comment section what the benefit for the specific group would be.

Mark all that apply	Group	Comments
X	Students	
X	Faculty	
X	Staff	
X	My Department	IT Project Office, Construction & Planning Office
X	Campus Community	
	Other	

5. Estimated Project Timeline

Timeline includes proposed date of Procurement, date of initial implementation, anticipated implementation time frame, and Proposed Go-Live Date(s).

Proposed Date of Procurement:	February 2009
Proposed Date of Implementation Phase I:	March 2009
Anticipated Implementation time frame (in months):	6 months
Proposed Go-Live Date Phase I:	September 2009
Proposed Date of Implementation Phase II:	TBD

Please note: For Complex and Medium sized projects, an additional document, the Project Definition Document (PDD), will need to be completed before the product can be purchased or the contract for services can be signed.

6. Estimated Project Resources/Stakeholders/Time Commitment

List key personnel that will be needed to implement this project and the duration and timing of their commitment needed for this project such as "20hours a week for 2 weeks in the middle of the project".

Key Personnel	Estimated Time Commitment)
Name *Title* *Department*	
Jackie Droll, Brian Jackson – IT Project Office	
Bryan Stephens and one more from the Applications group	
Jody Casares, IT Business Office	
John Russell, Clay Smith, Patricia Payne, Sabrina Cowart - Facilities Planning & Const.	

7. Project Financial Analysis

Part A

What are the projected costs and sources of funding for this project? Please use additional lines to insert other projected costs not listed here. Please attach a copy of any software agreements from the vendor concerning this project.

Table 1: Implementation Costs: Phase I			
Item	**# of Units**	**Unit Cost**	**Total Cost**
Software Subscription	1	$	$
Hardware	1	$	$
Implementation Services	1	$	$
Travel	1	$	$
Offsite Training Services (3 people each attending 3 courses)	9	$	$
First Year Maintenance	1	$	$
Contingency (10%)	-	-	$
Total			**$**
Source of Funding			

Table 2: Recurring Costs: Phase I			
Item	**# of Units**	**Unit Cost**	**Total Cost**
Yearly Maintenance	1	$	$
Total			**$**
Source of Funding			

Part B

When will the project start to show returns/results?	Within the first 3 months after go-live

8. Project Impact Analysis

Part A
List the primary focus of the implementation of this project.

X	Primary Focus
	Will lead to an increase in enrollment
X	Will increase business process efficiencies
X	Will keep our office operational (upgrades, replacing outdated software)

Part B
List the level of impact in each of the following areas by assigning a value of 0 – 5 by each area listed using the following scorecard. 0 – No Impact, 1 – Minimal Impact, 2 Minor Impact, 3 – Moderate Impact, 4 – Significant Impact, 5 – Major Impact.

Score	Areas of Impact
5	Strategic (University wide Impact: Student related, Employee related)
0	Increased Revenue (Departmental Impact)
4	Customer Satisfaction (Departmental Impact)
5	Expansion in Service (Departmental Impact)
5	Increase in Departmental Efficiencies (Departmental Impact)
3	Cost Reduction (Departmental Impact)

9. Project Goals and Objectives

Understanding how the proposed project will solve the business problem is critical to project success. This section states the goals and objectives of the project.

Goal 1. Electronically track technology related projects through initiation, selection, and prioritization to ensure alignment with ASU strategic objectives.

Goal 2. Plan, monitor and control all projects in an electronic, structured and efficient manner.

Goal 3. Create a system of consistent communication with project team members, stakeholders, steering committee members, and project champions of the status of initiatives being tracked by the project office to ensure successful completion of each phase of the project life cycle.

Goal 4. Ensure that financial and people resources are properly aligned for

implementation of projects and their on-going support.

Goal 5. Develop a balanced Portfolio based on ASU strategic objectives to encourage project selection and prioritization based on these objectives.

Goal 6. Incorporate a Lessons Learned Library showcasing previous projects to give Project Managers access to valuable resource information on projects of similar size and complexity.

Goal 7. Develop standardized reports with minimal duplication of effort.

10. Project Performance Measures

Setting performance measures for a project is essential; otherwise, there is no basis for determining the business value. Clear measures allow an organization to balance financial factors against quality and security of delivery. The key factor is to ensure that the proposed project is business driven. Performance measures establish quantifiable outputs and outcomes that achieve the target. Therefore, they must describe specific results that can be measured to demonstrate that a potential project provides the value described in the target. Characteristics of useful performance measures include:

Specific: *Clear, unambiguous, and easy to understand by those who are required to achieve them*
Measurable: *Setting a target for which success can be gauged by referring to a specific measure or measures*
Achievable: *Expressing specific aims that staff feel can realistically be achieved with some effort*
Relevant: *Applicable to those who will be required to meet them*
Time-Oriented: *Set timescale for achieving a target*

Tracking of Individual Projects
By September of 2009 be able to track the status & Percentage complete of each technology and construction project electronically.
By September 2009 be able to document, track, and view documents including Business Justification, Project Definition Document, Project Summary, Status Updates, Project Charter, Project Implementation Plan, Project costs, and Action Items and Issues for each project in a structured and consistent manner via the web.
By September 2009 be able to assess projected resource requirements per project against actuals per project.

Tracking of all Projects
By September 2009 be able to show what our current project portfolio looks like without duplication of effort.
By September 2009 be able to assess if a good project is a good fit with our ASU Strategic Objectives and our current portfolio based upon those objectives.

By September 2009 have all project statuses within the software be updated by the project manager of each project over the web.

Sharing of Information
By September 2009 be able to share number of projects within each phase of the project life cycle over the web without duplication of effort.
By September 2009 be able to show detailed summary reports of each project over the web including project status and % complete.
By September 2009 be able to show a listing of all projects within each phase of the project life cycle over the web (including their classification, risk level, and strategic impact).
By September 2009 be able to showcase a library of lessons learned from previous projects as a resource for Project Managers.
By September 2009 have standardized reports to share with upper management through dashboards over the web.

11. Project Assumptions

List and describe any assumptions relevant to the project that is being recommended to achieve the anticipated business outcome.

We will be able to continue normal business operations during implementation.

We will no longer need to keep the current project spreadsheet up to date once we go live with the software.

Project Management practices will be promoted and adhered to by all project managers.

12. Project Constraints

List and describe any limiting factors, or constraints, relevant to the project that is being recommended to achieve the anticipated business outcomes.

Limited resource availability to implement the software.

13. Project Dependencies

List any ongoing Projects/Products whose deliverables will be required to enable this project to meet its objectives.

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14. Project Risks

Identifying potential problems and developing a plan to manage risks are essential steps to ensure that Angelo State University can mitigate, transfer, or accept certain risks through proper actions.

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Resources will not be available to implement the software.
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15. Glossary

All terms and acronyms required to interpret the Business Justification properly should be defined here.

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16. Reviewer Comments

As the Business Justification moves through the approval process, comments from reviewers should be entered here.

Name/Title/Department	Date:
Comments:	

Name/Title/Department	Date:
Comments:	

Business Justification Signoff

Name, Title	Date
Name, Title	Date
Name, Title	Date
Name, Title	Date
Name, Title	Date
Name, Title	Date

Project Approval

Department Head/Director/Dean	Date
Information Technology Representative	Date
Technology Services Project Manager	Date