# Project Description/Issue Statement (may include project triggers):

Deploy the Localist calendar solution and populate it with OSU events before the start of Fall Term, 2018.

# Goals & Objectives:

## Strategic Goal(s) Supported

## Business Objectives

The current calendar system is

- Dependent on outdated components unable to be upgraded.

- Lacking in modern features such as supporting images, social media connections, mobile interfaces and user-directed filtering of multiple calendars

A need is seen to replace, retire or invest resources to rewrite the code.

## IT Objectives

Localist supports the following IT strategic investment focus on university scaled approaches by:

- allowing users to easily add events to own calendars

- subscribe to groups, indicate “I’m going” and receiving updates if events are changed.

- consolidating separate calendars and enabling users to filter, search and view them in an ad-hoc fashion.

(Relavent text from IS strategic investment plan):

*- Embrace modern approaches and create rich engagement with learners and community members through personalized notifications, easy access to resources, and just-in-time information.*

# Project Governance

|  |  |
| --- | --- |
| Role | Name/Org |
| Project Sponsor |  |
| Project Manager |  |

# Project Scope:

|  |  |  |
| --- | --- | --- |
| Scope | In | Out |
| **Functional** |  |  |
| Identify and configure initial set of features to activate | X |  |
| Establish processes and guidelines for event submission and moderation | X |  |
| Identify staffing requirements for long-term support and maintenance | X |  |
| Provide long-term support and maintenance |  | X |
| **Organizational** |  |  |
| Address all users of existing “calendar” system | X |  |
| **System** |  |  |
| Replace existing “calendar” system, remove unneeded calendars and suggest solution(s) for existing active calendars | X |  |
| Replicate all functionality of existing “calendar” system |  | X |
| Implement all desired features of new system |  | X |
| *All other Scope* |  |  |

# Flexibility Matrix:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Least Flexible | Moderately Flexible | Most Flexible |
| Scope | X |  |  |
| Schedule |  |  | X |
| Resources |  | X |  |

# Key Project Deliverables

Feature requirements gathered and initial set configured and deployed.

Localist deployed and populated with qualifying content moved or copied from current calendar system.

Instructions provided for creating events and deploying widgets.

Guidelines created for content and structure of events and moderating content.

Decommission existing calendar system

Marketing and communication of new calendar

# *Preliminary* Schedule and Milestones:

|  |  |
| --- | --- |
| Milestone | Date (mm/yy) |
| Project initiation |  |
| Project completion | 01/2018 |

# Staffing Estimates

|  |  |  |
| --- | --- | --- |
| Role | Effort | Name/Org |
| Sponsor | .1 FTE | Derek Whiteside/IS-Web & Mobile Services |
| Project manager | .3 FTE | Jill Swenson/IS-Enterprise Computing Services |
| Web design | .1 FTE | Kegan Sims/Interactive communications |
| Platform administrator | .3 FTE | Nick Blum/IS-Web & Mobile Services |
| Event administration | .5 FTE | Kegan Sims/Interactive communciations |
| Calendar migration/cleanup | .3 FTE | IS-Web & Mobile Services |
| Integrator | .2 FTE | Jose Cedeno/ IS-Enterprise Computing Services |
| Communications | < .1 FTE | Michael McDonald/ IS-Web & Mobile Services |
| Support | .1 FTE | Kirsten Petersen/IS-Service Desk |

# Service

|  |  |  |
| --- | --- | --- |
| Item |  | Name/Org |
| Owner (when project completes) |  |  |
| Service | .1 FTE | Derek Whiteside |
| Platform administration | .1 FTE | Web Services |
| Event administration | .25 FTE | University Relationships & Marketing |
| Group administration | .25 FTE | University Relationships & Marketing |
| User support | .1 FTE | 1st tier: IS Service Desk2nd tier: Web Services and Marketing |

# Financial Estimate (opt.)

|  |  |
| --- | --- |
| Total Costs | Dollars |
| Initial Cost of Project | $7,000 |
| Ongoing Annual Cost | $7,000 |
| Total Benefits | Dollars |
| One-time Savings |  |
| Annual Savings |  |

## Funding Source

Initial Costs: IS $7,000 \*\*\*\* Includes no marketing or meeting costs.

Ongoing Costs:

## Benefit Description (e.g. revenue increase)

Decrease in maintence of existing calendar (mostly people time and OS license cost), which has reached end of life.

More modern look/feel/user experience including mobile platform, social media and calendar integration, photos and web widgets.

# Dependencies, Assumptions and Constraints

Solutions (move to Localist or other technologies) can be suggested for all existing calendars.

Existing calendar owners able/willing to participate in requirement gathering and migration work.

Resources available to deploy, migrate, own, support and maintain solution

People with strong event-writing skills exist and will be able to contribute to calendar moving forward.

# Project Performance Measures (opt)

Current calendar system ready to be turned off.

# Known Issues and Risks (of proposal)

Existing calendar owner needs may not be met by Localist.

Unknown desire for integration with other calendar sytems

Users of existing calendars may struggle to embrace move from separate/individual calendars to communal one where the view is more user-driven.

May not be able to locate and/or replace all locations where current calendar is viewed.

General note…doesn’t have to be just one page.

1. Project Description/Issue Statement
Summarize the project and business problems to be solved.
2. Goals & Objectives
Describe the major goals and objectives of the project from both a business perspective and an IT perspective, if relevant. [Note: clarify language that business objectives should be in terms of capabilities needed – not assets/IT language, etc]
3. Project Governance

List the individuals assigned in directing the project

1. Project Scope
Describe what is in and out of scope from a functional (boundaries around what the solution does), organizational (who is affected) and systems (which systems or infrastructure is involved) perspective.
2. Flexibility Matrix
Assess where the flexibility will reside for the project to react to uncertainty as the portfolio is created. The assessment is relative between the three factors.
3. Key Project Deliverables
List deliverables for the project in terms of business and process capabilities rather than *in terms of changes to particular applications/assets*.
4. Preliminary Schedule and Milestones
List the anticipated start and end dates of the project. Include dates of required interim milestones as appropriate.
5. Staffing estimates
List the estimated roles and % FTE required to complete the project (e.g 50% DBA, 10% web programmer).
6. Service
Enter the proposed long-term owner of the delivered solution when the project completes.
7. Financial Estimate (summary of cost-benefit analysis)

Under Total Costs, list the expected cost to deploy the project (include software, hardware, vendor costs, training, travel, marketing, etc.). List the expected annual cost to maintain the delivered solution (include maintenance fees, service costs, renewals, additional staffing, etc.)

Under Total Benefits, list the expected income or recovery costs (people, hardware, software renewals, additional fees, etc.)

Under Funding source, list the index/account, grant name or organization to provide funding

1. Dependencies, Assumptions, and Constraints
List related project deliverables, important assumptions made, and imposed constraints. Note if the project's benefits are dependent on other project delivery dates, business projects/events or seasonal trends (e.g., in time for back-to-school).
2. Issues and Risks
Document any anticipated issues and risks with the project that should be considered during portfolio planning.