



UW-MADISON INFORMATION TECHNOLOGY

Connecting & Supporting Our Digital Campus

Office of the CIO, IT Center of Excellence
IT Governance Initiative
IT Project Intake, Evaluation and Decision-Making Process

Completing the IT Project Intake Form

Before you begin, please review the **IT Project Intake Process Guidelines** for what you should know before you begin submitting a project proposal as well as background on the project proposal process.

Use the template version of the form to prepare your answers in advance of using the online intake form.

** Questions that are scored*

Basic Information

The following basic information is requested:

Project name

Project sponsor (*Sponsor's email address*)

Campus unit

The school, college or administrative unit proposing the project

IT Director (*IT Director's email address*)

The individual in your school, college, or administrative unit who is responsible for the area relevant to the proposal (Ex; CIO, IT Director, etc) and aware of the project

Proposed by (*Proposer's email address*)

Submitted by (*Submitter's email address*)

Project Information

Project description

Clearly articulate what the project hopes to accomplish. That is, what capability, service or function will your IT project produce irrespective of any technical solution you may already have in mind?

Explain why it is reasonable to proceed with the IT project you are proposing, including how it will further the mission, objectives and business processes that it supports. You

are welcome to upload or provide a link to a longer argument or business case document but it is not required for initial submission.

Has a solution or general approach been chosen? For example:

- Build a solution on campus
- Modify an existing service
- Buy a solution
- Contract with a solution provider

What other solutions or approaches were considered?

Project goals

Please select the categories that best describe the goals of the IT component of the project. *(Check all that apply)*

- Improved or new capabilities
- Better user experience
- Cost savings
- Exploration/innovation *(cutting-edge technology, differentiating capabilities, etc.)*
- Generate or increase revenue
- Efficiency
- Risk management or mitigation
- Regulatory or compliance
- Other *(text box)*

Alignment with [Campus Strategic Framework](#)

Please select which categories of the Campus Strategic Framework are supported by this project. *(Check all that apply)*

- Educational Experience
- Research and Scholarship
- The Wisconsin Idea
- Our People
- Resource Stewardship

TAG reviews

Please select the UW-Madison Technical Advisory Group (or groups) you believe most appropriate to review your project? *(Check all that apply)*

- Divisional TAG (See [Divisional Technology Advisory Group](#) for description)
- Teaching and Learning TAG (See [Teaching and Learning Technology Advisory Group](#) for description)
- Research TAG (see [Research Technology Advisory Group](#) for description)
- Infrastructure TAG (see [Infrastructure Advisory Group](#) for description)

1. Similar campus IT services and IT projects*

Are you aware of any existing service currently utilized on campus, or any project in development, that is similar to what you are proposing to do? (Note: If the purpose of your project is explicitly to replace, or modify an existing campus service, please answer 'Yes' to this question)

- Yes
- No

If yes, please use the project description field (see above) to explain what existing, similar shared service/s or project/s you identified and what additional value this proposed service or project will provide. What differentiates it from similar existing services or projects?

2. Potential campus-wide IT service*

If this project will create a new IT service, does it have the potential to become or replace a campus-wide shared service?

- Yes
- No

3. Cost to develop and implement*

What is the estimated total IT cost to develop and implement the project? (*Includes software and hardware purchases, licensing, IT staff time, consultants, etc.*)

- Less than \$100,000
- \$100,000 to \$499,999
- \$500,000 or more

4. Initial labor cost*

What are the estimated hours of UW-Madison IT staff time needed to develop and implement the project?

- Less than 500 hours
- 500 to 4,999 hours
- 5,000 hours

5. Ongoing costs*

What are the estimated total IT costs to operate/maintain the solution for the three-year period following implementation? (*Includes software/hardware maintenance and licensing, IT staff time, etc.*)

- Less than \$100,000 (total IT cost for the three-year period)
- \$100,000 to \$499,999 (total IT cost for the three-year period)
- \$500,000 or more (total IT cost for the three-year period)

6. Funding status*

Is the project fully funded?

- Yes
- No

7. Impact on infrastructure*

Do you anticipate that the solution may require increasing the capacity of existing UW-Madison IT infrastructure? (*Ex; network, storage, datacenter allocation, middleware, cooling, power...*)

- Yes
- No

8. Scope of the project's impact*

How many departments or divisions will be affected by the project if it is implemented?

- Department/Divisional
- Two or more divisions
- Central/campus-wide/UW System

9. Roles of end users*

What are the roles of end users who will be affected by the project if it is implemented?
(*Choose all that apply*)

- Students (credit or non-credit)
- Faculty and Instructors
- Departmental staff
- Divisional staff
- External partners/the public

10. Total number impacted*

Please estimate the total number of people who will be directly or indirectly affected by the solution if it is implemented?

- Less than 1,000
- 1,000 to 9,999
- 10,000 or more

11. Data security

Will the project collect, store, or access data that must be kept private? (Ex; [data classified as restricted or sensitive](#) by FERPA, HIPAA, or other policies)

- Yes
- No

If yes, please review campus policies regarding handling of restricted and sensitive data

If yes, has the Cybersecurity Governance, Risk Management and Compliance team been engaged to help evaluate the project?

If no, please contact Cybersecurity at cybersecurity@cio.wisc.edu

12. Procurement

Will this include external purchases of hardware, software or services that cost more than \$5,000?

- Yes
- No

If yes, has procurement authority been established and is Purchasing aware of this procurement?

External purchases will require following processes that are unique to the UW and State of Wisconsin (<http://www.bussvc.wisc.edu/purch/pppindx.html>). Approval to move forward with any project will be subject to meeting the relevant requirements for your purchase. Have you contacted Purchasing Services with regard to this specific purchase? (Purchasing Services, 21 N Park St Suite 6101, Madison, WI 53715 608-262-1526, purch@bussvc.wisc.edu)

Please see the **IT Project Intake Process Guidelines** for further information on the overall process.

All supporting materials are available online: <https://it.wisc.edu/it-community/governance/project-intake-prioritization/>

Additional resources

The IT Center of Excellence can provide direction and support for the project intake process. They can also assist with identifying existing services or projects listed in the campus Service Catalog or Project Portfolio that are similar to those you are considering.

IT Center of Excellence, Office of the CIO:

Email: icoe@cio.wisc.edu

Phone: (608) 263-7318