This document is required for evaluation of technology purchases over $20k in one fiscal year, and recommended for high impact projects.

**Project/Purchase Information**

Area Technical Representative:
Project Owner (Requester) and Department:
Divisional Dean/AVP/Director:
Divisional Vice President:
Additional Project Champion(s):

**Part 1: Introduction/Background**

**Executive Support**

The objective of this step is to get an understanding of senior administrators’ goals and support for the purchase. Will this purchase support divisional goals? Will this purchase remedy audit finding(s)? Does this project align with other divisional projects?

**Stakeholder Analysis**

The main objective of stakeholder analysis is to identify information needs and assess the extent to which the current system meets those needs. Consider this section as the area’s dream solution. With the perfect purchase, what results would the new system achieve? Be sure not to evaluate the current system. What tools/items do you wish for in a system and why?

**Deadlines**

Is there a hard deadline for this project/purchase? Why must the project be completed by this date?

**Evaluate for Cabinet Review**

The University Cabinet has determined that projects and software acquisitions that meet any of the following criteria require agreement by Cabinet to proceed:

- Any situation where application/system failure would result in a significant impact to the campus
- The project implementation has significant impact to internal business processes
- The Project’s Total Cost of Ownership (TCO) exceeds $150k Year 1 / $300k five years, including application, infrastructure, consulting, staffing, training, maintenance and/or hosting, and other related costs.

Does this project/purchase meet the criteria for Cabinet review? Yes No

**Part 2: Research**

**Evaluation of Current System or need for New System**

This step involves systematically reviewing the current system or potential new system, which includes technology, processes, procedures, and staffing. Include/identify strengths and weaknesses of the current system, including a section on desired characteristics of a future system (if applicable). What problem are you looking to solve? Is there a consequence of not doing this project/purchase? What are the Pro’s and Con’s of the current system?
**Project Research**

What alternative software packages are available (on campus or off campus) that could meet your needs? What significant improvements does the new system offer versus the current process or solution? What other higher education institutions have implemented this software? What is the customer service reputation of each vendor evaluated? Is the total cost of ownership higher or lower than other providers? How much customization is required for the specific product to meet desired functionality? What would a successful solution look like?

**Impact on Improving Student Success**

How does this project/purchase effect student success, both direct and indirect? How does this project/purchase align with our campus strategic plan or other university initiatives, including GI 2025?

**Part 3: Evaluation of Alternatives**

This step involves specification of the benefits, costs, and risks of each alternative (including not purchasing new software).

**Present Options**

List all options including the software you are requesting, all competitors evaluated, modifying existing software, or not purchasing. In each option, there may be more choices on how to structure the organization or information technology to support the specific option.

**Part 4: Recommendations & Implementation Readiness**

**Develop Recommendations**

It is important that any recommendation be strongly supported with data and analysis that shows why it is superior to other options under consideration. If a clear recommendation does not emerge, it is probably better not to force one and instead conduct a workshop or discussion with the senior administrators before attempting to construct a recommendation. Does the tool meet all or most of the needs of the purchasing area?

**Department Implementation Readiness**

Implementation readiness includes issues such as obtaining funds for software, installation and consulting services. Also included is assigning responsibility for development of a project, staffing, and training plan. Has a project plan been completed? Has a communication strategy been developed? Has the additional staff, if applicable, been hired?

**Campus Resources Requirement**

Describe the skills that will be needed to complete the project. Identify any individuals you feel need to work on this project. To what extent have you discussed this project with any of these people or departments? What is the level of effort for customers & functional users to learn how to use the new solution: (1) Minimal or none, (2) moderate, or (3) extensive and substantial? What is the success track record of these resources and any required vendors: (1) uses documented & repeatable processes for tracking status, problems, and changes, (2) good success but without structure for repeatability, or (3) inability to mitigate risk? What resources are required of Information Resources?

*(Please attach Project/Purchase Cost Worksheet to this review)*
Project / Purchase Cost Worksheet

Funding Availability?
Please indicate current funding status.
- Fully Funded – includes initial and on-going costs
- No Hard Costs
- Partially Funded – only on-going but initial costs not fully funded
- Partially Funded – only initial but no on-going funds
- No Funding

Funding Source:
Please indicate where funding will be received from.

Actual (or estimated) Year-One Investment:
(Software, licensing, hosting services, implementation services, training)

Estimated Annual Expenses (Post Year 1):
(Software maintenance, licensing, hosting, training)

Project Management:
- Internal or External?
- Estimated Cost?
  - Please list name(s) of project manager(s)

Project Staffing Requirements:
- Additional Staff (Number)
- Classification?
- Estimated Annual Cost with Benefits?

Other Costs Associated with Project/Purchase? (i.e. infrastructure, 3rd party integrations, mobile technology)