

ITS Executive Steering Committee (ITESC)

Agenda and Materials – June 21, 2022



Agenda

SSOM Admissions Technology Replacement

- D. Nabers, W. Kieca

Advancement RFP Results

- C. Van Hecke, D. Fitzgerald, C. Cannon (Zuri)

Project Portfolio Prioritization

- S. Malisch, J. Sibenaller

SSOM ADMISSIONS TECHNOLOGY RECOMMENDATION

PROJECT (3175)

*Presentation to ITESC
June 21, 2022*



Agenda

- Current State / Needs
- Project Overview / Benefits
- Summary
 - Needs Analysis / RFP
 - Survey
 - Additional Activities
 - Pricing
- Product Recommendation
- Next Steps

Current State

- Our admissions system is considered a ‘home-grown’ system and is not fully supported by AAMC
- Our current admissions system is antiquated and struggles to ‘adapt’ to our process
- Data integration between AMCAS and SSOM ADM system is problematic and limited every year
- ADM cycles in the current system are managed separately and provide no contiguous data collection or archival reporting platform among them
- Tracking for supplemental requirements, pre-requisite requirements, and criminal background checks are only possible through manual processes outside of the system
- No ability to communicate with individual candidates within the system (only as part of large global groups)

Current Needs

- Medical school admissions systems must be able to integrate seamlessly with AMCAS data to maximize use of admissions-related data
- Medical school admissions processing cannot be conducted without the use of AMCAS data
- Data integrity in the data exchange process between AMCAS and admissions system is crucial and needs to be sustainable
- Interview management capabilities need to be flexible for all medical schools in post-pandemic reality
- Processed data needs to be viewable, dynamic, and allow for advanced report building
- Processed scoring configurations need to be trusted and validated

Project Statement

Stritch School of Medicine embarked on analyzing, identifying and recommending the adoption of a medical school-wide cloud-based admissions management system to support the ever-increasing volume of participants within our applicant pool and committee process.

Key Project Team Members

Member	Role	Department
Darrell Nabers	Project Sponsor	Student Affairs - Admissions SSOM
Whitney Kieca	Functional Subject Matter Expert	Student Affairs - Admissions SSOM
Jim Sibenaller	Technology Assessment Consultant	ITS Architecture & Process Governance
Lydia Robertson	Assessment Project Manager	ITS Architecture & Project Management
Ross Naheedy	Application Support	ITS Integrations & Applications
Amy Hoyt	Application Support	ITS Integrations & Applications
Dawn Fitzgerald	Implementation Director	ITS Integrations & Applications
Kelly Pearce	Implementation Project Manager	ITS Integrations & Applications

Project Overview

- Class enrollment has grown by 7% since 2015 and is expected to continue growing in the future
- Hints already that Board will sign off on enrollment increase beyond current levels
- The volume of applications has increased by 47% since 2016 while the current admissions staff has decreased within same time

Project Overview Cont'd

- Staffing limitations combined with increased volume of applicants requires a more savvy and nimble system to support admissions process
- Process has outgrown our native system
- Goal to remain a viable consideration for future medical student candidates by improving efficiency of process.
- Foresee need to expand enrollment and committee participation

Benefits

An improved admissions system will provide greater opportunities to...

- Assess the demographic, academic, and experience related data that now populates the AMCAS application
- Approximate our process completely
- Communicate and track communications with all participants in the process (committee members, stakeholders and applicants)
- Identify and analyze historical data from year to year
- Improve integration with AMCAS data
- Adapt and scale to our needs

Benefits Cont'd

An improved admissions system will...

- Improve platform for management of candidate interviews, tracking, and outcomes
- Maintain design process and data to ensure trusted and validated scoring and decision-making outcomes
- Allow for process design and data to be validated, tested, and supported
- Remedy the concern that AMCAS will no longer support data integration for 'homegrown' or native systems moving forward

Assessment Summary

- Needs Assessment decision makers:
 - Sam Marzo, M.D. -Dean of the Medical School
 - James Mendez, Ph.D.- Senior Associate Dean of Student Affairs
 - Darrell Nabers, MS.c. -Assistant Dean of Admissions
- Assessment captured which features and functionalities were of importance to the sponsors & stakeholders
- AMP, Slate and WebAdMIT were selected to participate in the RFP

RFP Summary

- RFI sent out in late January & RFP sent out in late February
- RFP Scored by Sponsor, SSOM Admissions, Informatics HSC, ITS
- 28 sections scored (consisting of 209 Requirements)
- Scores were weighted based on Priority (must have, nice to have, etc.)
- Top 2 scored vendors invited to present to Loyola
- 29 invitations to LUC community for the two vendor presentations
- WebAdMIT: April 20, '22 (15 attended)
- AMP: April 21, '22 (14 attended)
- Survey prepared and distributed – AMP recommend by 100% of RFP Scorers

Summary			
	AMP	Slate	WebAdMIT
Business Requirements	A	C	C
Technical Requirements	B	A	B
Services-Support Requirements	A	B	B

Business Requirements & Vendor Services Scores

Business Requirements			
	AMP	Slate	WebAdMIT
Integration	A	B	B
Applicant Data/Records Management	A	B	B
Application Workflow	A	C	C
Student-Facing Portal	A	C	C
Security Model	A	A	B
Committee Management	A	F	F
Automated Application Scoring	A	C	C
Committee Review & Scoring	A	D	B
Interview Scheduling & Administration	A	D	C
Query/List-Building Tool	A	C	A
Communications	A	A	A
Reporting	A	A	B

Key	Percentage of requirements met
A	90%-100%
B	80%-89%
C	70%-79%
D	60%-69%
F	Below 60%

Services-Support Requirements			
	AMP	Slate	WebAdMIT
Services and Support	A	B	A
Vendor Services and Support	B	B	B
Loyola Support Requirements	A	A	A
Documentation Requirements	B	B	B
Training & Services	B	C	A
Implementation Requirements	A	A	B
Software Evaluation Services	B	A	A

ITS Summary

- RFP Technical Requirements Scored by Ross Naheedy; Rejoice Jebamalaidass; Jim Sibenaller; Jim Pardonek
- ITS participated in vendor presentations and technical & school calls

Technical Requirements			
	AMP	Slate	WebAdMIT
General Questions on Technology Environment	B	A	B
Desktop/Client Architecture	A	A	A
Operating Software, Database and Language	A	A	A
Data Storage and Access	B	B	B
Security, Authorization & Authentication	B	A	B
Solution Administration	A	A	B

- Technical Review: No critical concerns noted from the ITS Team
- Architecture Review: No critical concerns from Rejoice Jebamalaidass
- Security Review: No critical concerns from Jim Pardonek

Additional Activities

- Held Peer/Aspirational School Calls:
 - Slate
 - Univ. North Carolina – Randee Reid – Sept. 16
 - Univ. Of Massachusetts – Kendra Hacker – Sept. 17
 - AMP
 - Univ. Illinois Chicago – Kiantra Dion Loza – Sept. 29
 - Pritzker (Univ. Of Chicago) – Emily Sharp-Keller – Oct. 1
 - WebAdMIT
 - New York Medical College – James Demaio – Oct. 22

- Held Technical Calls with finalists:
 - WebAdMIT – April 20
 - AMP – April 29



Key Takeaways from School Calls

- Slate – UNC & UMass
 - UNC – Not fully integrated with AMCAS. Not using Slate to manage committees or supplemental application.
 - UMass – Extremely difficult to manage multiple programs with different/overlapping enrollment cycles (still implementing).
- AMP – UIC & Pritzker
 - UIC – Many customization changes need to go through AMP. Rep is responsive overall. Reviewing apps is intuitive and simple. Payment processing can be complex.
 - Pritzker – Worked closely with AMP to mirror current processes. Handles overlapping cycles well. Happy with the system overall.
- WebAdMIT – NYMC
 - Easy implementation, many manual processes (manual document and photo uploads), limited reporting/workflow capabilities.

Pricing Summary

	AMP	WebAdMIT	Slate
Cloud Services	\$182,160	\$88,200	\$379,500
Optional Modules	\$76,500	\$0	\$0
Implementation Services	\$30,000	\$0	\$0
Training	\$0	\$0	\$0
Sub-Total	\$288,660	\$88,200	\$379,500
Project Contingency (~15%)	\$12,000	\$2,500	\$11,000
Grand Total	\$300,660	\$90,700	\$390,500
User Licensing	Unlimited	Unlimited	Unlimited
App Volume	Unlimited	> 10,000	7,500-15,000
Med School Clients	Industry Leader	Established	Minimal
Vendor Intangible	Industry Leader	AMCAS Relationship	Existing LUC Vendor
Vendor Product Focus	Medical Admissions	Enrollment & Marketing	CRM
Capital Total (5 Year)	\$42,000	\$2,500	\$11,000
Operating Total (5 Year)	\$258,660	\$88,200	\$379,500
Ongoing Operating	\$52,830	\$17,850	\$77,250

Notes:

1) Funding for this effort is from the ITS Major Projects Initiative budget.

2) Cost reflects best and final offers from AMP and WebAdMIT.

We Recommend

AMP by ZAP Solutions



Company Background

- ZAP Solutions has been in business for over 23 years
- Headquartered in Pittsburgh, and currently employs 26 people
- AMP is designed specifically around the medical and graduate school admissions processes
- 100% of ZAP Solutions' clients are institutions of higher education
- ZAP Solutions is the market leader in medical school admissions software
- AMP is currently used by over 100 medical schools, and in total over 130 public and private schools internationally

MEDICAL SCHOOL CLIENTS *CONFIDENTIAL*

- Alpert Medical School at Brown University
- A.T. Still University College of Osteopathic Medicine – AZ & MI
- Baylor College of Medicine
- Burrell College of Osteopathic Medicine
- Case Western Reserve University School of Medicine
- Central Michigan University College of Medicine
- CHBU College of Osteopathic Medicine
- Columbia University School of Physicians and Surgeons
- Cooper Medical School of Rowan University
- Cumming School of Medicine at University of Calgary
- David Geffen School of Medicine at UCLA
- Drexel University College of Medicine
- Edward Via College of Osteopathic Medicine
- Elson S. Floyd College of Medicine at Washington State University
- Emory University School of Medicine
- Geisel School of Medicine at Dartmouth University
- Geisinger Commonwealth School of Medicine
- Georgetown University School of Medicine
- Georgia Regents University (formerly MCG)
- Harvard University School of Medicine
- Hofstra North Shore – LIJ School of Medicine
- Icahn School of Medicine at Mount Sinai
- Indiana University School of Medicine
- James Cook University College of Medicine & Dentistry
- Kalcer Permanente – Bernard J. Tyson School of Medicine
- Keck School of Medicine of USC
- Larner College of Medicine at the University of Vermont
- Loma Linda University School of Medicine
- Marian University College of Osteopathic Medicine
- Mayo Foundation for Medical Education & Research
- Medical College of Wisconsin
- Mercer University School of Medicine
- Michigan State University College of Human Medicine
- Michigan State University School of Osteopathic Medicine
- Monash University School of Medicine
- New York University School of Medicine
- NYU Long Island School of Medicine
- Northwestern University Feinberg School of Medicine
- Oakland University William Beaumont School of Medicine
- Penn State University School of Medicine
- Perelman School of Medicine at the University of Pennsylvania
- Quillen College of Medicine – East Tennessee State University
- Quinnipiac University School of Medicine
- Renaissance School of Medicine at Stony Brook University
- Rowan University School of Osteopathic Medicine
- Rush Medical College
- Rutgers New Jersey Medical School
- Rutgers Robert Wood Johnson Medical School
- Saint Louis University School of Medicine
- Sam Houston State University - College of Osteopathic Medicine
- Sidney Kimmel Medical College – Thomas Jefferson University
- Stanford University School of Medicine
- SUNY Downstate Medical School
- SUNY Upstate Medical University
- TCU and UNTHSC School of Medicine
- Texas A&M University College of Medicine
- TTUHSC at El Paso - Paul L. Foster School of Medicine
- TTUHSC El Paso Woody L. Hunt School of Dental Medicine
- TTUHSC at Lubbock
- Tufts University School of Medicine
- Tulane University School of Medicine
- University of Alabama School of Medicine
- University of Arizona College of Medicine – Tucson
- University of British Columbia Faculty of Medicine
- University of California, Davis School of Medicine
- University of California, Irvine School of Medicine
- University of California, Riverside School of Medicine
- University of California, San Diego School of Medicine
- University of California, San Francisco School of Medicine
- University of Chicago Pritzker School of Medicine
- University of Colorado School of Medicine
- University of Florida College of Medicine
- University of Houston College of Medicine
- University of Illinois College of Medicine
- University of Maryland College of Medicine
- University of Missouri-Kansas City School of Medicine
- University of Nevada School of Medicine
- University of New Mexico School of Medicine
- University of Oklahoma College of Medicine
- University of Pikeville - Kentucky College of Osteopathic Medicine
- University of Rochester School of Medicine
- University of South Carolina School of Medicine

Reasons for Recommendation

- Survey Results indicated that 100% of RFP Scorers recommended AMP over WebAdMIT.
- AMP has good integration capabilities, automation, functionality, and meets the most business requirements of the vendors analyzed.
- WebAdMIT lacks automation capabilities which would result in additional employees needed in admissions to manage the workload.
- Although Slate met the technical/services and support requirements, they have limited experience with medical schools admissions processes & few medical school client referrals fully implemented.

Next Steps...

- Obtain Approval to Award Bid
- Inform Academic Technology Committee
- Start Contract Negotiations
- Begin Scope and Planning Process
 - Requirements to mirror current workflow & rubrics
 - Estimation of contingency for customizations (if needed)
 - Data integration
 - Parallel processing
 - Support & knowledge transfer from the vendor
- Plan for a Spring 2023 Implementation



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ITESC PRESENTATION
JUNE 21, 2022

ADVANCEMENT CRM RFP

Charles Van Hecke, Advancement
Chris Cannon, Zuri Group
Dawn Fitzgerald, ITS

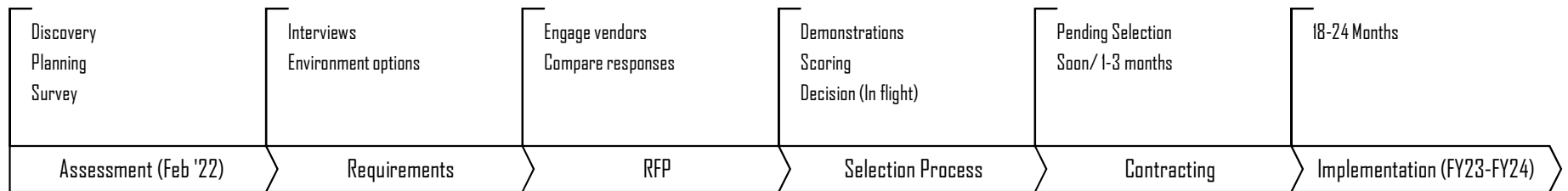


AGENDA

- Project Overview
- RFP Summary
 - Survey
 - Needs Analysis / RFP
 - Pricing
- Next Steps

PROJECT OVERVIEW

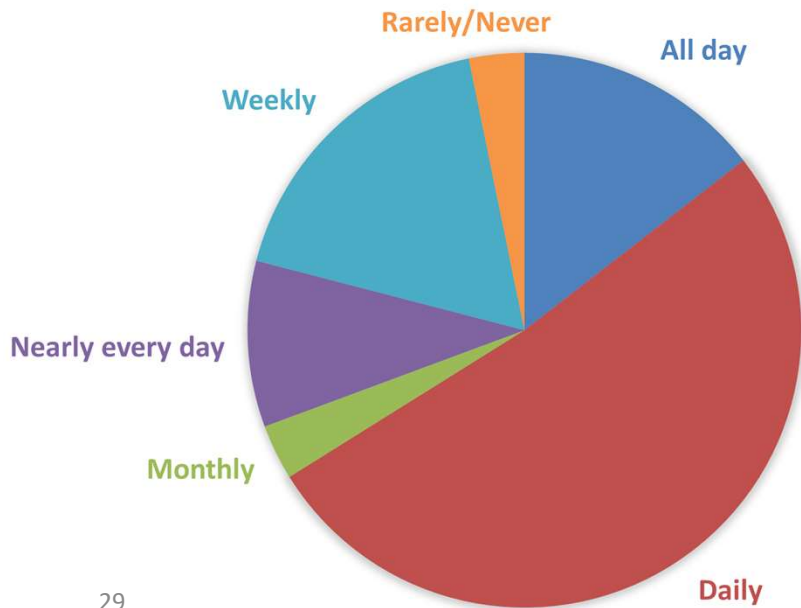
- 2020 – Blue State consulting conducted a CRM assessment for Advancement.
 - Replacement of the current Advance 2017 system recommended.
 - Advance 2017 is nearing end of life; no longer functionally enhanced.
- 2021 – CRM RFP process for vendor selection and implementation approved by Advancement and Finance.
 - Selection of a consulting partner was conducted by Advancement and ITS.
- Zuri Group engaged for vendor selection and implementation.
- February 2022 - RFP process started with interviews, survey, fit-gap, and requirements.
- Loyola team is now close to selecting between two viable / best-in-class options.



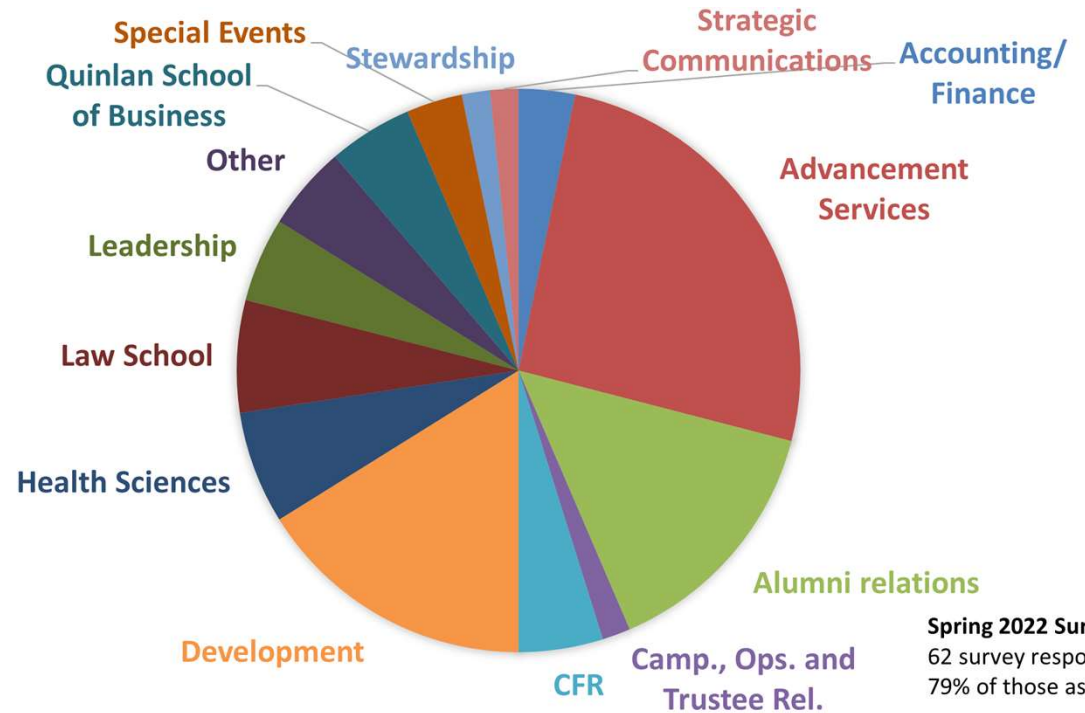
SURVEY RESPONDENTS

- Overall **response rate 79%**
- Majority of respondents are experienced users
- **Central** respondents make up **80%** of the total
- **Unit-based** respondents make up **20%** of the total

FREQUENCY OF ADVANCE USE BY RESPONDENTS



PARTICIPANTS BY TEAM/DEPARTMENT



Spring 2022 Survey
62 survey responses;
79% of those asked

SURVEY RESULTS HIGHLIGHTS

- **Processes**
 - Nearly 50% disagreed or strongly disagreed that policies and procedures are clear and supportive.
 - **Conclusion:** CRM implementation provides an opportunity to automate workflows and clarify processes.
- **Reporting**
 - 75% agreed, strongly agreed, or were neutral that report resources are accessible.
 - 79% agreed or strongly agreed they use Excel and other tools to complete reporting.
 - **Conclusion:** CRM implementation should simplify reporting environments and enhance self-service.
- **Engagement**
 - 65% of relevant respondents report looking forward to direct project involvement.
 - **Conclusion:** CRM implementation should benefit from good participation.
- **Common goals for Future State Advancement CRM**
 - Better integrations
 - Ease of use / productivity gains
 - Automation where possible
 - Customized / personalized views
 - Mobile functionality

NEEDS ANALYSIS / RFP

- 45 staff interviewed Spring 2022.
- Uncovered future state, current needs, and implementation implications.
- Resulting 420 requirements listed
- RFP developed incorporating LUCs required RFP standard language.

	A	B	C	D
	Appendix	Category	Index	Requirement
1	Appendix 3B: Gift Processing	Accounting	3.2.001	Can control which donations and types of donations are reported to Accounti report on them separately.
2	Appendix 3B: Gift Processing	Accounting	3.2.002	Workflow to send all gifts, pledges and adjustments to the accounting system be able to tie the allocation/designation to the accounting system. Must cont identify purpose, department, school/college, GL number, as well as several fields to record other pertinent information.
3	Appendix 3B: Gift Processing	Accounting	3.2.003	Can produce electronic donation log for download to finance, summarized by regular basis.
4	Appendix 3B: Gift Processing	Accounting	3.2.004	Need a way to review endowments and fund spending information in the sys
5	Appendix 3B: Gift Processing	Accounting	3.2.005	Ability to search on linked GL accounting numbers and information
6	Appendix 3B: Gift Processing	Accounting	3.2.006	Ability to manage multiple fund types or categories (e.g. endowed, capital, c restricted, unrestricted, etc.)
7	Appendix 3B: Gift Processing	Adjustments	3.2.007	Ability to adjust gifts including designation, amount, pledge installment (Change donor ID?)
8	Appendix 3B: Gift Processing	Adjustments	3.2.008	Can adjust pledge amount or payment schedule without deleting entire pled history with ability for approval workflow.
9	Appendix 3B: Gift Processing	Anonymus	3.2.009	Donors can be anonymous for specific donations and viewable by specified u
10	Appendix 3B: Gift Processing	Audit	3.2.010	Capable of auditing additions/edits/deletes on multiple data elements storir corresponding changed by and timestamps.
11	Appendix 3B: Gift Processing	Audit	3.2.011	Capable of auditing additions/edits/deletes on multiple data elements storir corresponding changed by and timestamps.
12	Appendix 3B: Gift Processing	Batch	3.2.012	Ability to enter and process all gift, pledge, and non-gift transactions via batc set defaults for all batch fields to speed entry.
13	Appendix 3B: Gift Processing	Batch		Ability to prompt (within a gift batch) to users to apply gifts to outstanding pl Ability to prompt (within a gift batch) to users if a pledge exists on the spous.



Preparing people to lead extraordinary lives

CRM Replacement - RFP

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Preparing people to lead extraordinary lives

RFP VENDORS

Based on requirements analysis, Zuri recommended five vendors be invited to respond to the RFP

AFFINAQUEST – Built on the Salesforce Platform, designed by Jeff Shy, designer of JSI’s Millennium.

The Affinaquest team has a depth of experience in Advancement operations, which informs the solution’s functionality. Clients include Georgetown and Wellesley.

BLACKBAUD CRM – BBCRM is Blackbaud’s enterprise-class system built on the Microsoft SQL Server platform.

BBCRM is intended as a comprehensive solution, incorporating many of the functions required by nonprofit and higher-ed advancement organizations. Clients include Boston College, Marquette, and Santa Clara.

ELLUCIAN CRM ADVANCE – CRM Advance is Ellucian’s next-gen solution in the CRM space.

Though its architecture differs from Advance Web (AWA), its infrastructure and support remain consistent, allowing Ellucian to offer a simpler approach to implementation for existing AWA clients. Clients include Oregon State University and University of Denver.

Ellucian stated an intention to propose, but the submission was not a proposal. Ellucian was eliminated.

SLATE – By Technolutions is primarily known for its student services and admissions CRM. Advancement functionality is fairly new.

The solution has been adopted by smaller institutions, including Albion and Bard Colleges. **The lack of detail and inappropriate terminology in the proposal demonstrated a lack of understanding of advancement in general, and LUC. Slate was eliminated.**

UCI ASCEND – Built on the Salesforce platform, as an extension of Salesforce’s core product: Nonprofit Success Pack (NPSP).

This solution offers Salesforce functionality and integration capabilities with higher-ed specific data elements and information management. Clients include Xavier, University of Chicago and Purdue.

RFP PROPOSAL REVIEWS & DEMONSTRATIONS

- UC Innovation, Affinaquest, and Blackbaud moved to demos based on RFP.
- Completed full day demonstrations done via web meeting; recordings were made available for LUC staff.
- The scoring showed the following results out of a total possible score of 300:
 - **Blackbaud scored 210.2**
 - **UCI scored 205.8**
 - Affinaquest scored 192.3
- Blackbaud scored slightly higher in functional.
- UCI ascend solution scored higher in technical areas.
- The difference between the two scores overall is not substantial; both are strong options.

BLACKBAUD BCRM CLIENTS



UCI ASCEND CLIENTS



Latest Clients



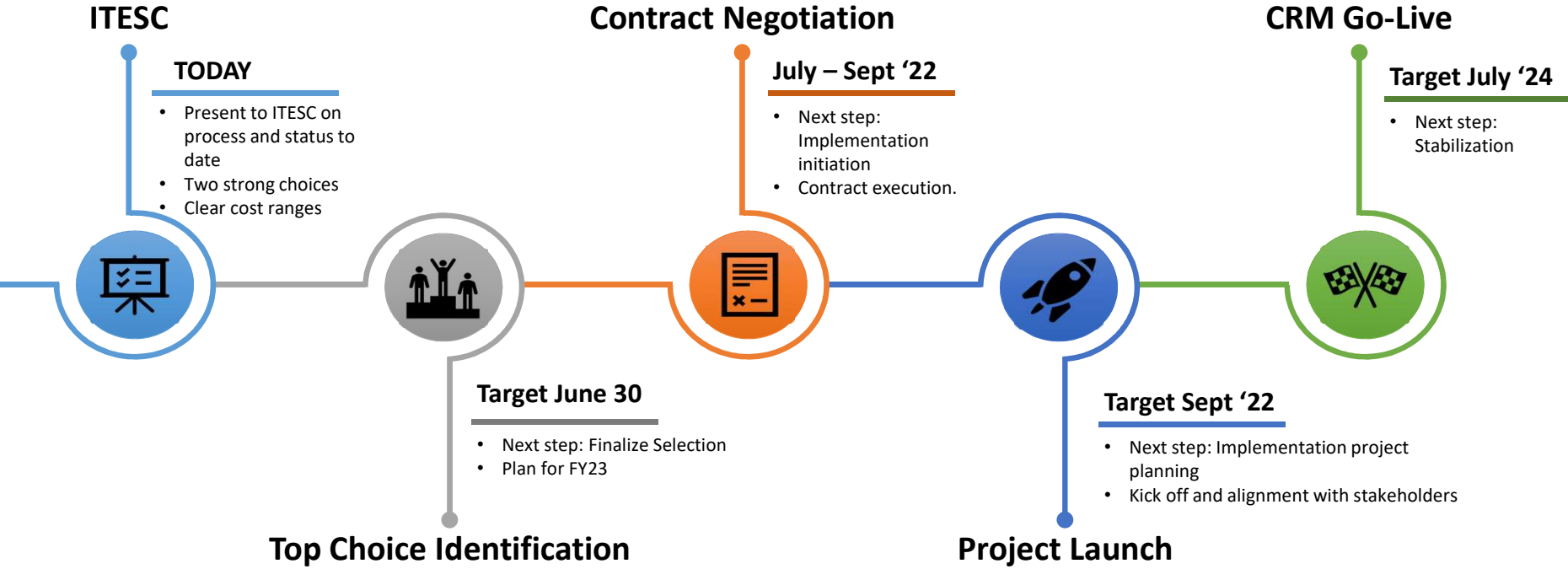
PRICING : COST ESTIMATES, BLACKBAUD AND UCI

*** NOT BEST AND FINAL. BASED ON RFP RESPONSES AND ZURI EXPERIENCE**

- For these options, when application, integration, and related costs are counted, though, the differences are marginal.
- Implementation period cost vary by around \$50,000; annual operating costs likely differ by less than \$5,000.
- Blackbaud cost through FY25 = \$3.97 million; UCI cost through FY25 = \$3.93 million.

Cost Calculations for Top CRM Replacmeent Options (Estimates based on Vendor Responses and Market Info.)	Blackbaud Cost FY23	Blackbaud Cost FY24	Annual Operating Costs Starting FY25	UCI Cost FY23	UCI Cost FY24	Annual Operating Costs Starting FY25
CRM Application Subscription (150 users)	\$ 312,690	\$ 312,690	\$ 341,051	\$ 110,000	\$ 110,000	\$ 110,000
Additional Vendor Platform Cost	n/a	n/a		\$ 129,000	\$ 129,000	\$ 129,000
Gift Officer Productivity Tool(s) (50 users), other subscriptions		\$ 56,500	\$ 56,500	\$ 30,000	\$ 30,000	\$ 30,000
Reporting Tool(s) (150 users)	in CRM (MS365 license)	in CRM (MS365 license)		\$ 57,803	\$ 57,803	\$ 57,803
Data warehouse tool(s)		\$ 91,000	\$ 91,000			
Data integration tool(s)		\$ 35,000	\$ 35,000		\$ 42,000	\$ 42,000
Portal/Community				\$ 15,732	\$ 15,732	\$ 15,732
Email Marketing		\$ 45,000	\$ 45,000		\$ 53,726	\$ 53,726
Extra storage					\$ 52,500	\$ 52,500
Sandbox	\$ 34,000	\$ 34,000	\$ 34,000			\$ 86,058
Support (UCI only)				\$ 22,000	\$ 22,000	\$ 22,000
Proposed "Must-Have" Components	\$ 346,690	\$ 574,190	\$ 602,551	\$ 364,535	\$ 512,761	\$ 598,819
Implementation: Services provided by, or contracted by, Zuri	\$ 1,225,000	\$ 1,225,000		\$ 1,225,000	\$ 1,225,000	
Estimated Total Cost to Go-Live	\$1,571,690	\$1,799,190		\$1,589,535	\$1,737,761	
Estimated Annual Operating Costs Starting FY 25			\$ 602,551			\$ 598,819

SELECTION NEXT STEPS AND TIMING



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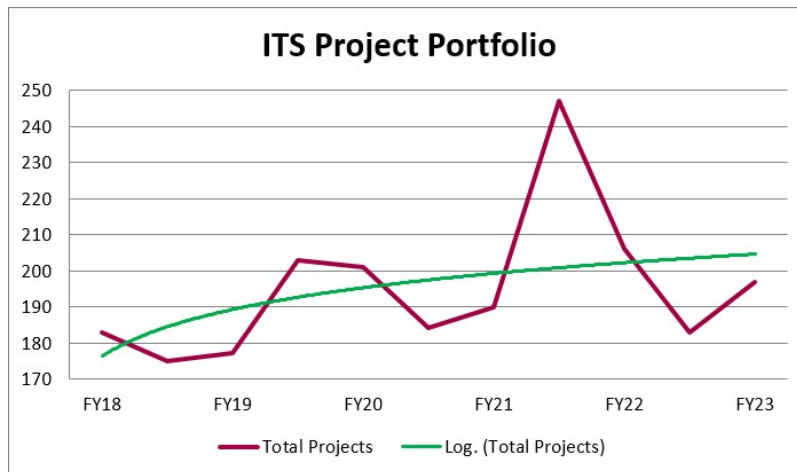
Plan of Record Tracking

POR Activity	Total Count	T-Shirt Sizing Breakdown						
		XX-Large	X-Large	Large	Medium	Small	X-Small	XX-Small
Original FY22 Q3-Q4 POR	183	12	16	41	73	36	3	2
Revised FY22 Q3-Q4 POR	183	12	16	41	74	35	3	2
New Projects Started	241	5	10	18	26	38	5	139
Final FY22 Q3-Q4 POR	424	17	26	59	100	73	8	141
Completed Projects	(201)	1	1	10	20	29	5	135
Forecasted Completed Projects	(16)	0	3	0	4	9	0	0
Duplicate/Canceled/Move to Ops	(12)	0	1	1	4	5	1	0
Rollover Projects	195	16	21	48	72	30	2	6
New Projects not Started	2	0	1	1	0	0	0	0
FY23 Q1-Q2 POR (Draft)	197	16	22	49	72	30	2	6
Net Change	14	4	6	8	(1)	(6)	(1)	4

Project Sizing Trend

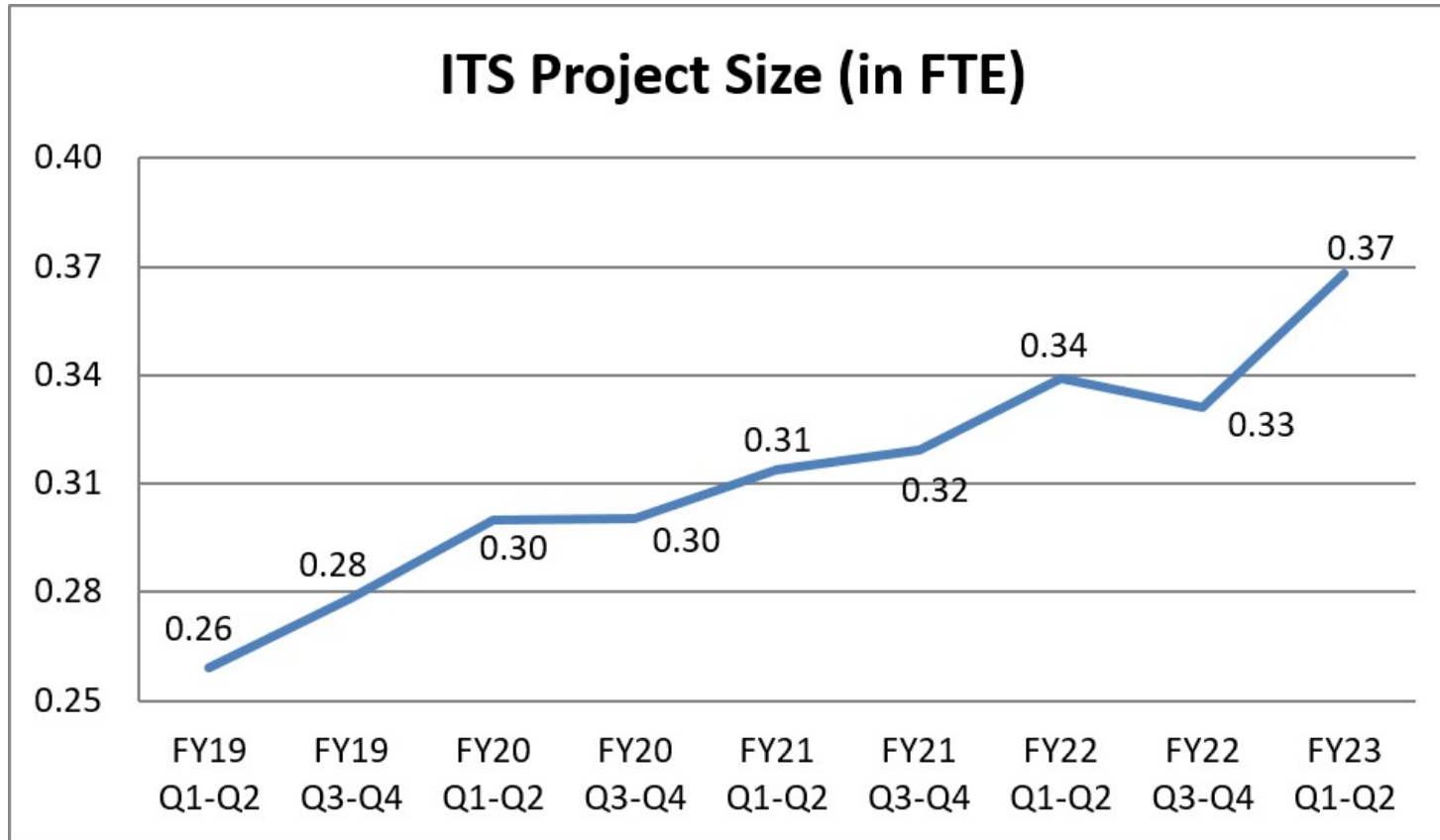
Portfolio Counts

T-Shirt Sizing	Work Effort	FY18 Q1-Q2	FY18 Q3-Q4	FY19 Q1-Q2	FY19 Q3-Q4	FY20 Q1-Q2	FY20 Q3-Q4	FY21 Q1-Q2	FY21 Q3-Q4	FY22 Q1-Q2	FY22 Q3-Q4	FY23 Q1-Q2
TBD	TBD	0	0	0	0	0	0	0	0	0	0	0
XX-Small	< 3 Days	0	0	0	0	0	0	0	5	1	2	6
X-Small	3-5 Days	2	1	1	4	3	2	3	5	3	3	2
Small	5-30 Days	36	31	40	50	45	41	42	62	47	36	30
Medium	31-60 Days	96	92	94	96	97	86	83	93	79	73	72
Large	61-120 Days	34	36	31	35	34	36	40	46	44	41	49
X-Large	121-180 Days	15	15	11	18	22	19	22	18	16	16	22
XX-Large	>180 Days	0	0	0	0	0	0	0	18	16	12	16
Portfolio Total		183	175	177	203	201	184	190	247	206	183	197

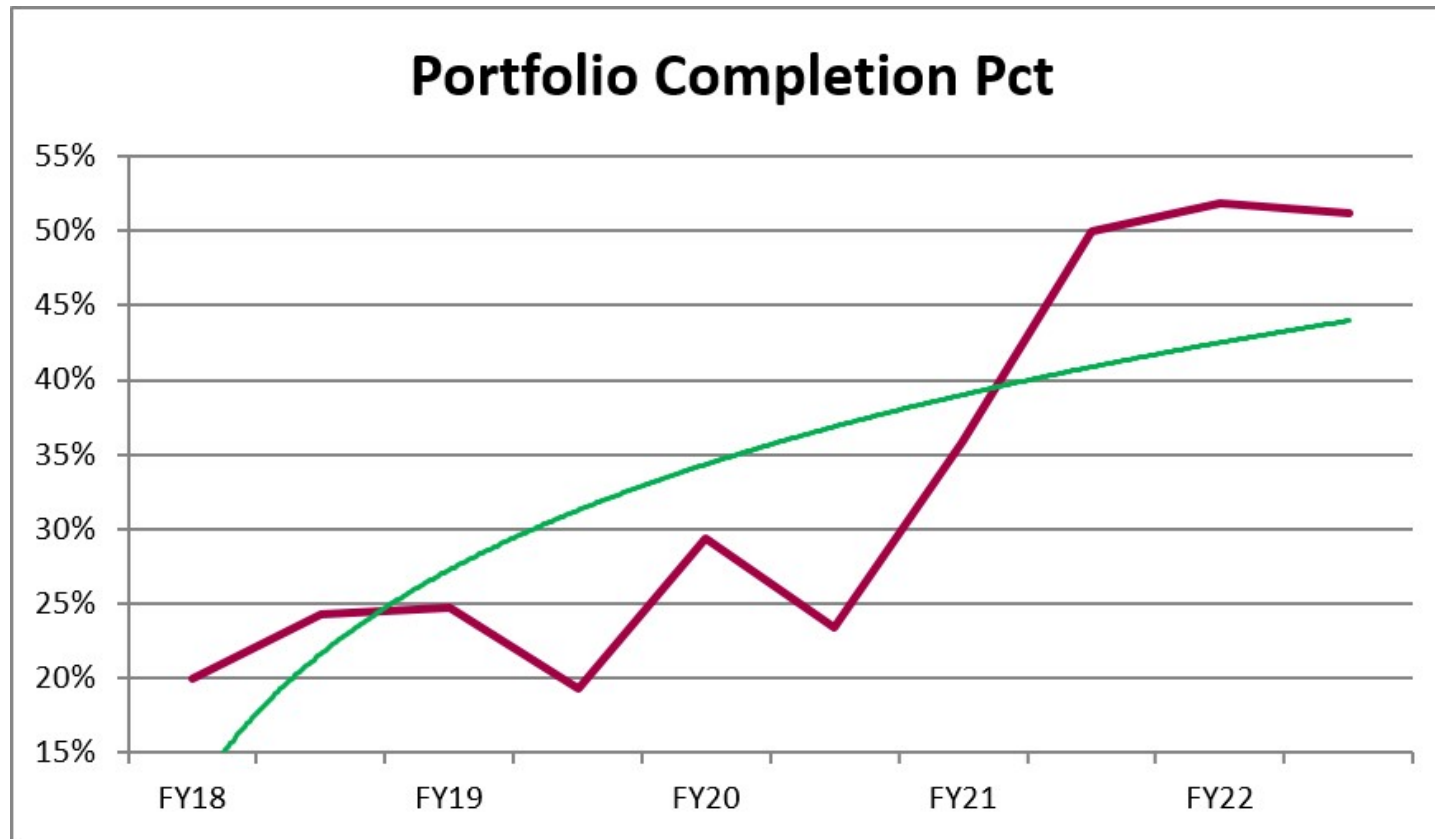


	Avg.	Min	Max	This Period
Portfolio	195	175	247	197

Average Project Size



Completed Project Forecast



201 projects complete

16 projects forecast to be complete

217 total completed this period

	Avg.	Min	Max	This Period
Completed Pct.	32%	19%	52%	51% (forecasted)

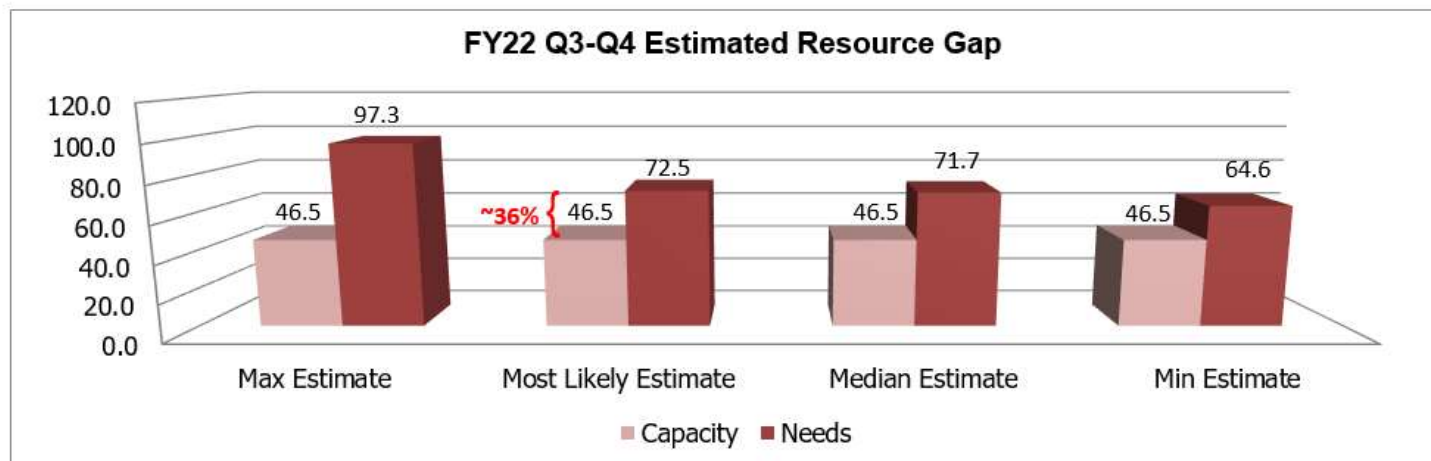
Capacity Estimates

T-Shirt Sizing	Work Effort	Initial Project Count*	Project Effort** (FTE)	ITS Capacity/Resource Calculations (FTE)			Est. Effort Allocation	Est. Time Allocation	Most Likely Estimate Gap
XX-Small	< 3 Days	6	0.02	Full Time	124.0	Admin.	28.4	23%	36%
X-Small	3-5 Days	2	0.03	Part time	1.4	Support	50.3	41%	
Small	5-30 Days	30	2.7	Total FTE	<u>125.4</u>	COVID-19 Support***	0.2	0%	
Medium	31-60 Days	72	13.9			Research	5.7	5%	
Large	61-120 Days	49	18.9			Projects	40.8	33%	
X-Large	121-180 Days	22	13.2			Total	125.4	101%	
XX-Large	>180 Days	16	23.9						
Total		197	72.5						

*** COVID-19 support reduced

* snapshot as of 6/16/2022

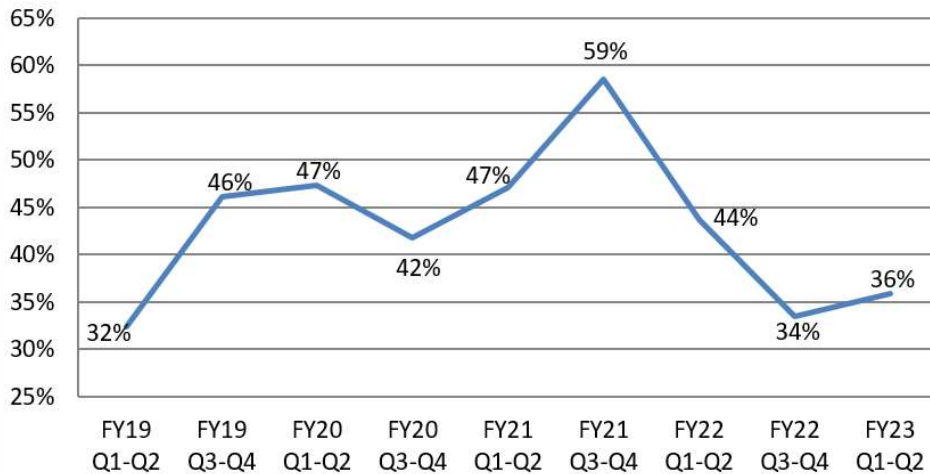
** most likely scenario



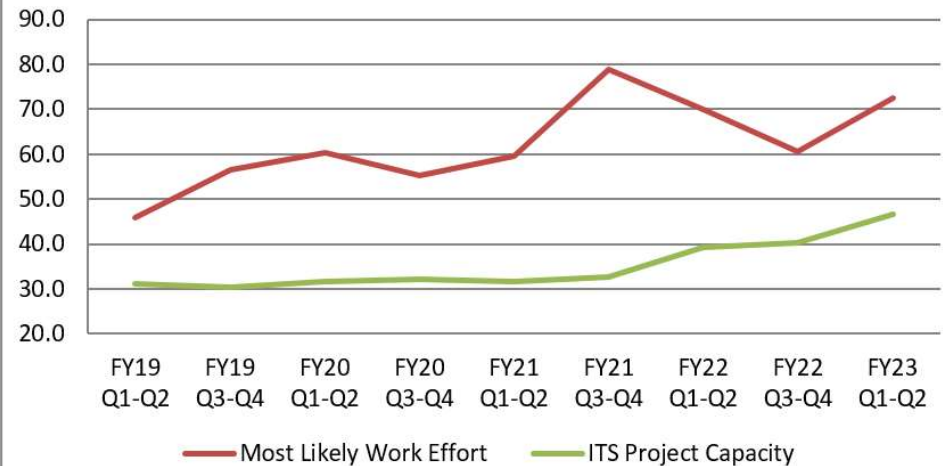
Portfolio Growth Details

	FY19 Q1-Q2	FY19 Q3-Q4	FY20 Q1-Q2	FY20 Q3-Q4	FY21 Q1-Q2	FY21 Q3-Q4	FY22 Q1-Q2	FY22 Q3-Q4	FY23 Q1-Q2	5 Year Avg
Portfolio Count	177	203	201	184	190	247	206	183	197	195
Portfolio Growth	1%	15%	-1%	-8%	3%	30%	-17%	8%	2%	
Most Likely Work Effort	45.8	56.5	60.3	55.2	59.6	78.9	69.9	60.6	72.5	58.9
Most Likely Work Effort Growth	-11%	19%	6%	-9%	7%	24%	-13%	-15%	16%	
ITS Project Capacity	31.0	30.4	31.7	32.1	31.5	32.7	39.3	40.3	46.5	33.2
ITS Project Capacity Growth	-2%	-2%	4%	1%	-2%	4%	17%	2%	13%	
Estimated Resource Gap	32%	46%	47%	42%	47%	59%	44%	34%	36%	44%

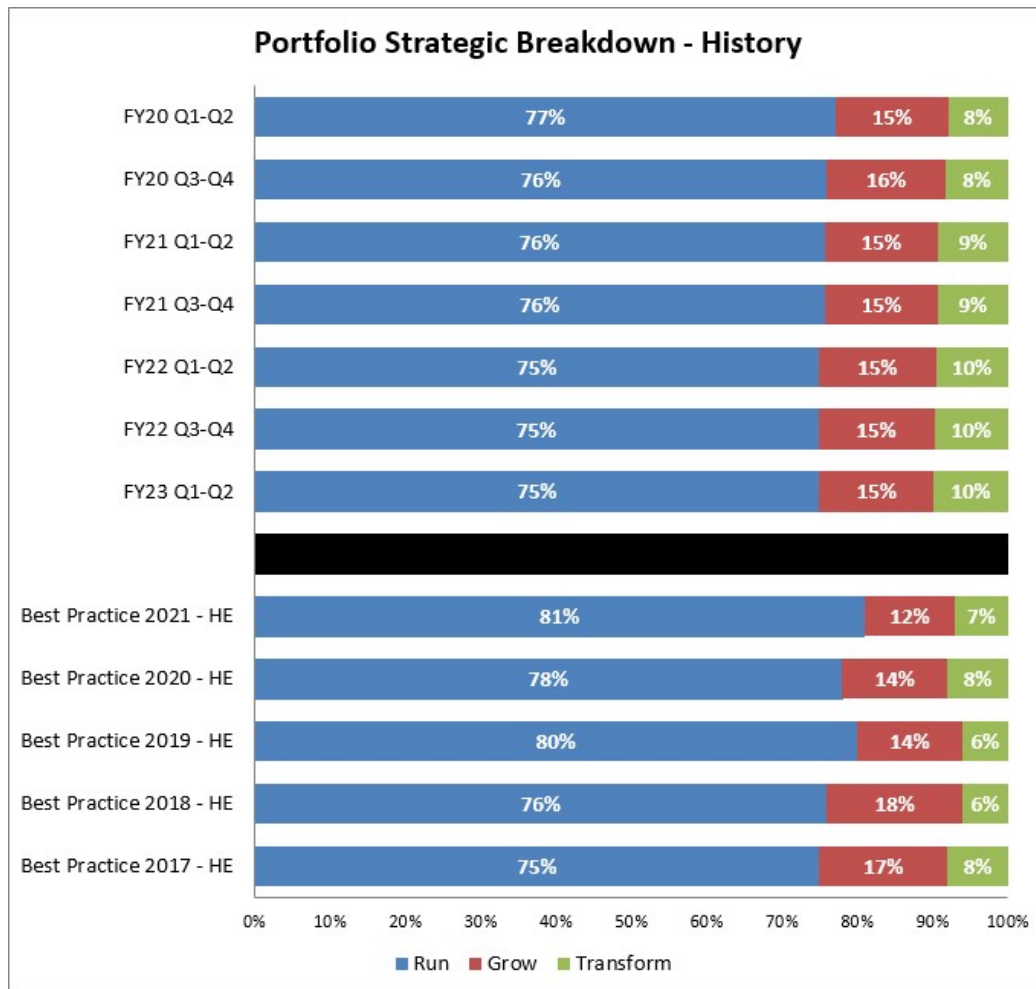
ITS Project Portfolio Resource Gap



ITS Project Portfolio Resource Gap



ITS Project Portfolio Impact



Run – Ongoing operations

Grow – Information systems and services to optimize performance

Transform – New technologies and processes that fundamentally promote change

Excludes research projects

FY23 Q1-Q2 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	1-2	LOCUS Enhancements (2)	Large	Active	TBD	Enterprise/Multiple
A	1	Financial Aid - Loans/ Disbursements 2022-23 Aid Year	Medium	Active	Q4 FY23	Financial Assistance
A	2	FA - Annual Student Loan Acknowledgement	Large	Hold	TBD	Financial Assistance
	3-8	Information Security Program (6)	XXLarge	Active	Q3 FY23	Enterprise/Multiple
A	3	Broaden Use of SIEM Technologies	XXLarge	Active	Q1 FY23	Information Technology Services
A	4	System Access Audit	Medium	Active	Q1 FY23	Information Technology Services
A	5	Information Security BOT Dashboard/Status Page	Small	Active	Q1 FY23	Information Technology Services
A	6	Endpoint Detection and Response (Dedicated Ransomware Protection)	Large	Active	Q1 FY23	Information Technology Services
A	7	Security - Remove Outdated TLS from Servers	XLarge	Pending	Q2 FY23	Information Technology Services
A	8	High Security Lab Environment/Security Operations Center	Medium	Active	Q3 FY23	Information Technology Services
	9-13	IT Disaster Recovery (5)	XXLarge	Hold	TBD	Enterprise/Multiple
A	9	Disaster Recovery Planning	XLarge	Hold	Q2 FY23	Information Technology Services
A	10	Business Continuity for Departmental Staff	XXLarge	Hold	Q2 FY23	Information Technology Services
A	11	2022 DR Plan Review & Testing	XXLarge	Pending	Q2 FY23	Information Technology Services
A	12	Disaster Recovery - TouchNet Paypath/TPG	Small	Hold	TBD	Information Technology Services
A	13	Network Services (Core) Disaster Recovery Plan	Medium	Hold	TBD	Information Technology Services
	14-19	Enterprise Content Management (6)	XLarge	Active	TBD	Enterprise/Multiple
A	14	Secure, web-based portal & document repository for School of Ed compliance	Medium	Active	Q1 FY23	School of Education
A	15	Accounts Payable to Treasury/Cash Management - Foreign Invoices	Small	Hold	Q2 FY23	Accounts Payable
A	16	HSC - Faculty Admin	Medium	Hold	Q2 FY23	Faculty Administration
A	17	ECM - Electronic Document Retention	Large	Hold	TBD	Information Technology Services
A	18	DocFinity webforms/automated workflows that perform transactions in LOCUS	Large	Hold	TBD	Registration & Records
A	19	Create interfaces between various Faculty Admin portals/systems & DocFinity	Large	Pending	TBD	Human Resources

FY23 Q1-Q2 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	20-28	Business Intelligence/Data Warehouse Program (9)	XXLarge	Active	TBD	Enterprise/Multiple
A	20	Learning Analytics - Phase 3	Large	Active	Q1 FY23	Information Technology Services
A	21	Develop an HR BI Dashboard, starting with key reports and metrics	XLarge	Active	Q1 FY23	Human Resources
A	22	WebFOCUS Conversion to Microsoft Reporting Services	XXLarge	Active	Q2 FY24	Information Technology Services
A	23	Unified Research Systems Dashboard	XLarge	Active	Q2 FY23	Research Services
A	24	Student Profile - Power BI	Large	Pending	TBD	Student Development - Office of VP
A	25	BI for Student Finance	XLarge	Hold	TBD	Finance-Office of VP-CFO
A	26	Revenue to Expense Model - Version 4	XLarge	Pending	TBD	Finance-Office of VP-CFO
A	27	Tracking and Reporting for the CARES Funds	Medium	Active	Q1 FY23	Controller's Office
A	28	Anti-Racism Initiative Dashboard	XLarge	Hold	TBD	Institute for Racial Justice
	29-32	Lawson/Kronos Enhancements (4)	Medium	Active	TBD	Enterprise/Multiple
A	29	Build API interface of employee data from WorkBright system to Lawson	Medium	Active	Q1 FY23	Human Resources
A	30	Recommend new process/system for invoicing & identifying cash receipts	Large	Active	Q1 FY23	Controller's Office
A	31	Analysis & recommendation for improving credit card cash receipts process	Large	Active	Q2 FY23	Controller's Office
A	32	Implement HR Open Enrollment confirmation statements module in Lawson	Small	Pending	TBD	Human Resources

FY23 Q1-Q2 ITS Ranked Separately Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	1	COVID-19 Related Projects (1)	XXLarge	Active	Q1 FY23	Enterprise/Multiple
A	1	COVID-19 Emergency Response	XXLarge	Active	Q1 FY23	Enterprise/Multiple

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	1-4	Research Computing Services (4)	XXLarge	Active	Q2 FY23	Health Sciences/LUHS
A	1	HashMap technology to support high-performance NLP	XXLarge	Active	Q2 FY23	School of Nursing
A	2	PCORI CAPriCORN 2020 Refresh	XXLarge	Hold	Q2 FY23	School of Health Sciences & Public Health
A	3	Observational Medical Outcomes Partnership (OMOP) Data Mapping for CTSA/ITM	XXLarge	Active	Q2 FY23	School of Health Sciences & Public Health
A	4	Natural Language Processing (NLP) to Enhance Computable Phenotyping	XXLarge	Active	Q2 FY23	School of Nursing

Draft **FY23 Q1-Q2 ITS Project Prioritization Worksheet**

Draft

Tab	Row Nbr	Program Group	Proposed Ranking	ITESC Ranking (Dec '21)	PRB Ranking (Jun '22)	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
	1-8	LDE Consumable Experience (2)	1	1	1	XXLarge	Active	TBD	Enterprise/Multiple
	1-6	Student Experience Lifecycle (6)				Large	Active	TBD	Enterprise/Multiple
Priority A	1	School Based CRM Pilot with Slate				Medium	Active	Q3 FY23	Arrupe/SON
Priority A	2	PeopleGrove Mentoring Platform - Central Hub				Medium	Active	Q1 FY23	Enterprise/Multiple
Priority A	3	PeopleGrove Mentoring Platform - SSOM Sub-Hub				Small	Active	Q1 FY23	Stritch School of Medicine
Priority A	4	PeopleGrove Mentoring Platform - School of Social Work Hub				Small	Active	Q1 FY23	School of Social Work
Priority A	5	PeopleGrove Mentoring Platform - Parkinson Hub				Small	Active	Q1 FY23	Parkinson
Priority A	6	PeopleGrove Mentoring Platform - School of Nursing Hub				Small	Pending	TBD	School of Nursing
Priority A	7	ITS Portal Pilot				Medium	Active	Q1 FY23	Information Technology Services
Priority A	8	LDE Digital Experience: O365 Application Portal				XXLarge	Pending	TBD	Enterprise/Multiple
	9-10	Advancement CRM Replacement	2	6	6	XXLarge	Active	Q2 FY23	Advancement
Priority A	9	Advancement CRM RFP				Large	Active	Q2 FY23	Advancement
Priority A	10	Advancement CRM Implementation				XLarge	Active	TBD	Advancement
Priority A	11	CourseLeaf Course and Curriculum Management Implementation	3	8	7	Large	Active	Q1 FY23	Registration & Records
Priority A	12	EAB Navigate - Phase II	4	4	4	Large	Active	Q1 FY23	Academic Advising and Services
Priority A	13	SSOM Admissions System Replacement	5	--	13	XXLarge	Active	Q3 FY23	Student Affairs - Admissions SSOM
Priority A	14	Data Governance & Integrity	6	5	5	XXLarge	Active	Q3 FY23	Enterprise/Multiple

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FY23 Q1-Q2 ITS Project Prioritization Worksheet

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Tab	Row Nbr	Program Group	Proposed Ranking	ITESC Ranking (Dec '21)	PRB Ranking (Jun '22)	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
	15-22	Faculty Administration Re-Architecture Strategy-FARS (8)	7	2	2	XXLarge	Active	Q2 FY23	Provost's Office
Priority A	15	Faculty Administration Re-Architecture Strategy-FARS				XXLarge	Active	Q1 FY23	Provost's Office
Priority A	16	Faculty Salary Planning				Large	Active	Q1 FY23	Provost's Office
Priority A	17	FARS Phase II Requirements and Future State Design				Large	Hold	Q2 FY23	Provost's Office
Priority A	18	Faculty Activity Reporting (replaces Digital Measures)				XLarge	Active	Q1 FY23	Provost's Office
Priority A	19	LSC Electronic PT Faculty Contracts				Medium	Active	Q2 FY23	Provost's Office
Priority A	20	Process Review of the Badge UVID and Badge Creation				Medium	Active	Q2 FY23	Provost's Office
Priority A	21	SSRs in HR queue for Information				Medium	Active	Q2 FY23	Human Resources
Priority A	22	Validate & Streamline Existing Workflow, Reports & Tools				Large	Active	Q2 FY23	Provost's Office
Priority A	23	Identity and Access Management Enhancements				8	3	3	XLarge
Priority A	24-27	LDE Transformation: Digital Assistant/Chatbots (4)	9	7	8	XLarge	Active	TBD	Enterprise/Multiple
Priority A	24	LUie Chatbot: Reporting, Governance, and Support				Large	Active	Q2 FY23	Information Technology Services
Priority A	25	Chatbot - Human Resources				Medium	Pending	TBD	Human Resources
Priority A	26	Chatbot - Academic Advising				Medium	Pending	TBD	Sullivan Center for Student Services
Priority A	27	Chatbot - Finance				Large	Pending	TBD	Financial Systems
Priority A	28	Financial Aid Award Letter Processes - Aid Year 2023	10	12	9	Medium	Active	Q4 FY23	Financial Assistance
Priority A	29	State Immunization Module Migration - Locus to Health App	11	--	10	Large	Active	Q2 FY23	Wellness Center

Draft FY23 Q1-Q2 ITS Project Prioritization Worksheet

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Tab	Row Nbr	Program Group	Proposed Ranking	ITESC Ranking (Dec '21)	PRB Ranking (Jun '22)	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
Priority A	30	Review and Evaluate Proposed Research Administration Solutions	12	13	11 (tie)	XXLarge	Pending	TBD	Provost's Office
Priority A	31	Academic Program Plan Auto Discontinuation Process	13	--	14	Large	Active	Q2 FY23	Registration & Records
Priority A	32	Dewar - Tuition Insurance Enhancements	14	--	15	Medium	Pending	Q3 FY23	Sullivan Center for Student Services
Priority A	33	Energy Management, Compliance, Mobile Enablement - Phase III (Archibus)	15	18	16	XLarge	Active	Q1 FY23	Facilities- Office of VP
Priority A	34	TAMS Evaluation and Implementation	16	--	17	XLarge	Active	Q1 FY23	School of Nursing
Priority A	35	Graduate Student Progress System Assessment / Replacement	17	--	18	Large	Active	Q4 FY23	Graduate School
Priority A	36	Implementation of Mobile Checkin Including Hardware Aquisition	18	--	19	Large	Active	Q1 FY23	Wellness Center
Priority A	37	Implement Single Conflict of Interest Platform for University	19	--	20	XLarge	Active	Q2 FY23	Research Services
Priority A	38	iParc Reader Replacement - Chip and Pin	20	--	21	Medium	Active	Q1 FY23	Campus Transportation
Priority A	39	Expense Management	Cancelled	10	11 (tie)	Large	Hold	TBD	Controller's Office
Priority A	40	Automate HSC Parking/ID Processes	Not Ranked	17	22	Medium	Active	Q1 FY23	School of Nursing

2022 ITESC Schedule

February 24, 2022 - Thursday, 1:00 PM-3:00 PM

- HIPAA Compliant Teleconferencing
- Major Project Updates
- Fake Job Phishing/Email for Life
- Disaster Recovery Tiers

April 28, 2022 - Thursday, 1:00 PM-3:00 PM

- HighPoint Mobile Upgrade
- Mobile Device Management
- WebFocus Migration
- AMIA - CNIE/CNIE

June 21, 2022 - Tuesday, 1:00 PM-3:00 PM

- SSOM Admissions Technology Replacement
- Advancement RFP Results
- Project Portfolio Prioritization

August 18, 2022 - Thursday, 1:00 PM-3:00 PM

- TBD

October 20, 2022 - Thursday, 1:00 PM-3:00 PM

- TBD

December 13, 2022 - Tuesday, 10:00 AM-12:00 PM

- Project Portfolio Prioritization