

MATC Project Charter

Tentative Project Name: Integrated Reporting System (IRS)Project

Project Level: Unit/Program Cluster/Dept. Division College

Charter Stage: Initial Review Submission Approved

CONTEXT FOR THE PROJECT

Summary: *(short description of the project)*

The Integrated Reporting System (IRS) Project will provide a web-based, interactive data warehouse which will allow all employees to make data-driven decisions. In order to accomplish this goal, the designers need to know what the needs are of the decision-makers in the College.

Implementing the IRS Project will permit the college to:

- Forecast needs and opportunities at all levels of the college
- Drive continuous improvement activities with relevant and valid data
- Permit planning based on a set of commonly defined data
- Allow the College to create standards of performance based on a common data set

Origin/History of the Project: *(why this project "rose to the top")*

The College recognizes that there is a disconnect between the current processes and systems and the people they serve. At the AQIP Strategy Forum the AQIP Steering Team realized that there had to be a multi-pronged effort in order to address the disconnect in an effective manner. The AQIP Steering Team made the determination through the use of several different continuous improvement exercises that an umbrella system of measures and reporting might have the desired effect. The AQIP Steering Team made a commitment to bring this idea back to the College as an AQIP Action Project.

Project Identification Process: *(Systems Appraisal, Consensus of group, etc.)*

The AQIP Steering Team underwent several planning exercises at the February 2006 Strategy Forum that were designed to identify the "big rock" issues facing the College. After much discussion, it was the consensus of the group that a college-wide umbrella for the various systems and measures currently used was needed in order to improve.

Project Sponsor: *(Individual providing oversight and support)*

Rebecca Baumbach, Vice-President of Strategic Advancement

Project Team Leader: *(Individual primarily responsible for the project)*

Scott Beard, Director of Institutional Effectiveness

Project's Key Stakeholders: *(People, Groups, etc. potentially affected by this project, internal and external)*

Employees, students, key collaborative partners, advisory group members, employers, legislators, WTCS, Southwest Consortium members, accrediting agencies

PROBLEM AND OPPORTUNITY

Problem This Project Would Solve:

The College's current data processes foster a dependency upon Institutional Research and do not create a sense of ownership on the part of the data user. The IRS Project would allow the users to select the most relevant and useful data in an easy-to-understand format. Data would be available in near real time from anywhere internet access is available.

Processes and Units Impacted/Improved by this Project:

Ideally, every unit and every process within the College will be impacted and improved.

Opportunities to be Leveraged:

Convocation, LSQIP, Systems Reporting Project, PeopleSoft Upgrade

PROJECT ASSUMPTIONS, SCOPE & LIMITATIONS

Key Assumptions on Which the Project is Based:

One key assumption is that every key action within the College can be measured reliably, either directly or indirectly on a consistent basis. Secondly, it is assumed that each decision maker knows what data is needed to make their decisions.

What is Included in the Project:

The project will have determine what data is needed by various decision makers at the College, determine where the data is or how to collect it, and the format in which the data will be presented. The project will also create a common data set for the College and set minimum standards of performance for the common data set.

What is Excluded From the Project:

The project will not be used to determine which academic programs to close or end. The project will not make recommendations for improvement at the unit level. The project will not make recommendations to Institutional Research or Technology Services that would necessitate the addition of staff or budget beyond requests found in this project charter.

Project Team’s Decision Making/Action Limitations:

The project will be limited to making non-binding recommendations for appropriate data collection, formatting, creation of a common data set and minimum standards of performance. Any recommendations made will be forwarded to the College Council for approval before implementation.

PROJECT GOAL, OBJECTIVES & MEASURES

How the College Will Be Different: *(Project Goal)*

Data and measures for assessment purposes will be in an easily accessible format. A set of common measures will be established with known standards of performance.

Objectives of the Project: *(Project Sub-Goals)*

The IRS will have the following objectives:

1. Provide a mechanism that will allow the College to identify opportunities and make improvements where needed.
2. Provide an easily accessible and understandable data reporting system that provides useful, relevant and timely data to each employee of the College.
3. Provide a common set of data with known standards of performance.

How this Project’s Goals and Objectives Align with the College’s Objectives:

This project will allow for the efficient and effective planning and assessment needs of the College.

Potential Benefits Provided by the Project:

Individuals will have the data available to identify opportunities for improvement and track progress in a more efficient and effective manner. The common data set will allow all within the College to discuss progress and performance based on a common set of known data and standards.

How We Will Know the Project Has Been Accomplished:

The project will be complete when the current data needs of the College have been identified and are being successfully met, when data is consistently being used as a part of the decision-making process and the College has a common data set with associated standards of performance.

Proposed Measures: *(If more than 5 measures, then attach separate sheet)*

	Is data currently available?	Will project create new data?
1. By the end of the 2006-2007 fiscal year fall semester, an overview of the data needs of various units throughout the College will be completed.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
2. By the end of the 2006-2007 fiscal year, data will be available to College personnel in the areas of student records, FTE data and courses and classes.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
3. By the end of the 2006-2007 fiscal year, the College will have a common data set and associated minimum standards of performance.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

4. By the end of the 2006-2007 fiscal year, each unit will demonstrate use of the data available through completion of the unit plan. Yes No Yes No

5. Yes No Yes No

Other Data Support Needed: Focus groups will be needed for the data needs portion of the project. (surveys, focus groups, etc.)

BUDGET

(Double-click on the table below. You will be taken to a separate Excel spreadsheet. Click on the "edits" tab and enter your information. When done, click on the "Summary" tab and save the document. You can then close the Excel spreadsheet and return to this document.)

Project's Anticipated Financial Costs:			
Staff, New:	\$32,471.00	Conference:	\$0.00
Travel:	\$141.10	Duplicating:	\$0.00
Meetings:	\$1,152.00	Advertising:	\$0.00
Materials / Supplies:	\$545.00	Contract Services:	\$0.00
Postage:	\$0.00	Other:	\$0.00
Sub Total	\$34,309.10	Sub Total	\$0.00

Project Budget Total:			\$34,309.10
Project's Potential Financial Benefits: (How would the project result in cut costs or increased revenue?)			
Units would know where to concentrate their efforts and provide improved service to their customers.			
Funding Available: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Source of Funds: unknown at this time			

Timeline

Project Start Date: 08/22/2006	Project End Date: 07/30/2009
Project Timeline: (Milestones)	Anticipated Completion Date
1. Project unveiled to College	8/22/2006
2. Focus group team formed	9/08/2006
3. Data focus groups occur throughout the College	11/10/06
4. Overview of data needs is provided to Institutional Research	12/15/2007
5. Reporting System for FTEs and Student Records is functional	1/10/2007
6. College Common Data Set with associated standards of performance is provided to College Council for approval	5/04/2007

CRITICAL SUCCESS FACTORS, RISKS, & APPROACH

Items or Support Needed for Project Success:
The focus groups must meet with a sufficient number of people to provide valuable insight into data needs. The College must be willing to accept the concept of standards of performance for the common data set. Administrative support will be needed in order to get buy-in from all employees.

Threats to Project Success:
Non-attendance by key decision makers may invalidate the determination of the data needs. If additional support for Institutional Research is not available, it would slow down or otherwise inhibit the continuation of the project.

Strategies, Tools, and Techniques to be Employed by the Project Team:
Focus groups will be used to solicit information regarding the data needs of various units throughout the College. Surveys may be used to determine acceptance of the common data set.

Project Team Members, Roles and Responsibilities:

<i>Individual*</i>	<i>Role</i>	<i>Responsibilities</i>
Becky Baumbach	Sponsor**	Has oversight responsibility for the area(s) that are affected by the project. This individual will normally be an upper administrative individual and may or may not attend team meetings.
Scott Beard	Team Leader	Responsible for the successful completion of the project and will therefore ensure that the team is on track and focused on the end goal.
Unknown	Team Facilitator	Supports the team by developing and managing the team's work and decision-making processes. In many cases the facilitator is NOT a member of the team and is therefore neutral.
Jeanne Rathgeber	Team Recorder	Responsible for documenting the team's process, discussion and decisions without editorializing. Provides meeting minutes and other materials to team members.
F/T Faculty x 2	team member	Focus Group/Common Data Set
P/T Faculty x 2	team member	Focus Group/Common Data Set
Mark Shymanski	team member	Common Data Set
Tom Heaney	team member	Common Data Set
Zong Her	team member	Focus Group/Common Data Set
Administrator	team member	Focus Group/Common Data Set

*At the beginning of a project it is permissible to indicate an office, unit or program if an individual's name is not immediately available.

** - May or may not participate in team meetings but will have some authority over the outcome

Date Charter Completed: 08/07/2006