



PROJECT CHARTER
CREDIT EVALUATION SERVICE REPORTING
(CES REPORTING)

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Version Control – This document supersedes all previous versions.

Version	Date	Author	Change Description
	4/14/2020	Phil Hull	Document created
1.0	5/8/2020	Nicole Olthafer	Version 1.0
2.0	5/11/20	Kelly Schumann	Timeline milestones w/o dates, ODMAS Resources w/o hours, Project change control process, Constraint prioritization
3.0	5/28/20	Kelly Schumann	Added dates to the Milestones and descriptions to ODMAS resource roles.
4.0	6/1/2020	Nicole Olthafer	Edited for Cathy Lloyd’s review comments
5.0	6/15/2020	Kelly Schumann	Corrected formatting

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PROJECT BACKGROUND AND OVERVIEW

The Enrollment Management Division has been tasked with a new initiative, the Transfer Recruitment Quadrant Plan. This plan has set lofty transfer recruitment goals, significantly increasing the number of new transfer students admitted and enrolled to the university for the next five years. The Office of Recruitment and Admissions, Office of the Registrar, and the entire division will rely heavily on our ability to provide timely and accurate data supporting our efforts to successfully provide accurate and timely credit evaluations for new prospective transfer students.

An investigation of reporting solutions for transfer evaluations revealed that PeopleSoft (as delivered) does not carry history for these evaluations. Every time a new transfer evaluation is performed, the system overwrites the previous evaluation, thus making it impossible to determine aggregate statistics such as time from transcript receipt to completed transfer course evaluations.

Changing existing data views to the new dimensional model architecture will allow us to capture the history of changes to transfer articulations and enable analytics of the process and downstream effects (i.e. time to degree, etc).

Once data has been exposed in the data warehouse, the Steward for Student Data will work with ODMAS to ensure the necessary groups (Data WONKS, BI COE, Tableau developer community) are made aware and receive information on how the data is structured.

1.1 Project Team

Project Management

Project Sponsor	Scott Owczarek, Office of the Registrar, Division of Enrollment Management
Project Owner	Phil Hull, Senior Data Strategist, Office of the Registrar, Division of Enrollment Management
Project Manager	Nicole Olthafer, Project Manager, DoIT-Academic Technology & Kelly Schumann, Project Manager, ODMAS

Core Project Team

Assistant Director, Data Warehouse, ODMAS	Rao Kunché
Data Warehouse Developer, ODMAS	Kevin Musser
Business Analyst, ODMAS	Kay Steiner
Senior Data Strategist, Office of the Registrar, Division of Enrollment Management	Phil Hull

Assistant Registrar for Credit Evaluation Services, Office of the Registrar, Division of Enrollment Management	Scott Golueke
Assistant Registrar, Office of the Registrar, Division of Enrollment Management	Jeff Kirschling
Business Analyst, Office of the Registrar, Division of Enrollment Management	Priya Sachithanandam
Data Specialist, Office of the Registrar, Division of Enrollment Management	Eric Durkee
Analyst, APIR	Clare Huhn

Steering Committee

Office of the Registrar, Division of Enrollment Management	Scott Owczarek
Chief Data Officer, ODMAS	Cathy Lloyd
Assistant Registrar, Office of the Registrar, Division of Enrollment Management	Jeff Kirschling

2 PROJECT SCOPE AND GOALS

The [Credit Evaluation Service \(CES\) Reporting project](#) is part of a larger effort - the Credit Evaluation Transition Project. The reporting effort will be broken into three phases to align with the priority as identified for each data need. Starting with the top priorities, each phase will follow an iterative approach starting with credit evaluation subject matter experts designing a mock-up for each data need. Sponsor / stakeholder sign-off will be obtained from these mock-ups and source tables by which to derive the data as well as historical data needs documented. ODMAS will then expose the data into the data warehouse in a manner that follows campus best practices and prevents disruption to other reporting needs on campus but also allows other units to report on this data should they need to. Once the data exists in the data warehouse, data strategists and specialists from within the RO will design the final visualizations for end-user use.

Initial data needs identified and broken into priority phases are as follows however the team reserves the right to reprioritize and adjust data needs as work progresses in this space.

Priority / Phase 1 Data Needs:

1. Time from admit decision to credit evaluation completion by audience: freshmen, new transfers, reentry students.
2. Time from transcript document creation to credit evaluation completion for continuing students.

3. Percentage of credit evals released with transfer admissions decision and impact on new student deposit yield.
4. How many courses without a rule are evaluated by time period?

Priority / Phase 2 Data Needs:

1. How many course transfer rules were created, inactivated, end-dated or modified by time period?
2. What institutions are students most commonly investigating transfer credit possibilities from?
3. What are the most common external institutions/course equivalents/external courses taken and submitted by different student population types by time period?
4. What are the most common external institutions / course equivalents / external courses taken and submitted by different student population types by time period?
5. How many courses are transcript recorded into SIS by time period and what percentage of these courses are evaluated?
6. What is the volume of test credits posted by type (AP, IB, A-Level, CLEP) and when are these credits commonly posted in relation to admission decision and SOAR?

Priority / Phase 3 Data Needs:

1. What are the most common courses being submitted by population type requesting course equivalency to be awarded?
2. How many credit re-evaluation requests are submitted by time period? What courses yield the most re-evaluation requests?

Goals that the project will be driving towards are as follows:

- The CES Reporting priority level 1 needs will be completed as soon as possible.
- Lessons learned from creating the priority level 1 data needs will be incorporated into the next phases of the project.
- The team will agree to a design process / document that is efficient and reproducible for future phases of project work by the end of priority 1 work.
- Priority level 2 needs shall be completed by 12/30/20.
- Priority level 3 needs shall be completed by 6/30/21.

3 CRITERIA FOR SUCCESS

This project will define success based on the following criteria:

This project will define success based on the following criteria:

- Campus partners will be able to use any reporting tool they are comfortable with (Tableau, Toad Data Point, MS Access, Power BI, etc) to obtain accurate, data driven reports

- Revised data view would easily link to other warehouse data dimensions (admissions, enrollment, student demographics, degrees, program/plan, etc)
 - Would not require customizations to SIS, and no/limited use of PeopleSoft development resources
 - Aligns with long term vision for Enterprise Reporting & Analytics
 - Exposing the data will allow UW-Madison to assess and propose new initiatives and process improvement related work in this space and have the data to drive towards metric-based improvements.
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4 PROJECT ASSUMPTIONS, CONSTRAINTS, RISKS

4.1 Project Assumptions

The following project assumptions are recognized for this project: (Circumstances and events that need to occur for the project to be successful but are outside of the control of the project team.)

- CES work in the RO is a top priority for their department and will continue to work to ensure sufficient resources and budget and available to cover work in this area.
- CES Reporting work will remain a priority for campus leadership ensuring sufficient resources and budget are available.
- Source and target systems will not be undergoing any major upgrades during the project timeframe.
- Where data cannot be exposed and consumed by the data warehouse, alternative consumption / reporting methods will need to be identified by RO data strategist / specialist.

4.2 Project Constraints

The following project constraints are recognized for this project. (Constraints are verified assumptions that alert us to obstacles that may restrict, limit or regulate the project i.e. Privacy laws, Federal approval timeframes, Limited resources available.)

- Subject matter expertise in the CES space is critical for the success of this project.
- Sponsors will provide timely review of mock-ups allowing phases of the project to move from design to development.
- Testing requirements and methods by which to track test use cases and results of testing will be provided as needed via training by ODMAS.
- ODMAS is working to move the Data Warehouse to the cloud and allow historical information to be captured. This is a resource dependency as the ODMAS will be working on the cloud migration and may pose constraints for this effort.

4.3 Project Risks

The following project risks are recognized for this project. (Risks are potential barriers which may or may not happen, leaving a level of uncertainty.)

- Some data needs may uncover lack of tracking sufficient data elements to make reporting vizzes possible.
- SME availability is necessary and has yet to be identified and allocated for this work.

5 COSTS AND RESOURCES

Anticipated costs include:

- CES project management for this effort is covered under a separate budget managed by the RO.
- RO resources are centrally funded and should not be accounted for in this budget.
- ODMAS resources are centrally funded and outlined below in the resource section.

The following resources have been identified as required:

- ODMAS Resource: Data Architect, Rao Kunche
 - Review requirements and assess functional and technical specifications, create data models and design, manage ETL development, provide expert feedback throughout project, perform internal testing and review UAT test results.
- ODMAS Resource: ETL Development, Kevin Musser
 - Perform ETL development, perform internal testing, issue fixes, provide expert feedback throughout the project.
- ODMAS Resource: Business Analyst, Kay Steiner
 - Review requirements and assess functional and technical specifications, manage the issues log throughout ETL development, provide expert feedback to all parties throughout the project, perform internal testing and review UAT test results.
- ODMAS/PPMO Resource: Project Coordinator, Kelly Schumann
 - Create project management documentation, lead project meetings once ETL development has started, monitor and send out project status reports, facilitate any change request escalations to the steering committee.
- APIR Resource: Analyst, Clare Huhn
 - Provide feedback on data needs outside the Registrar's Office, review requirements, assist in testing and collecting test results during UAT.
- RO Resource: Assistant Registrar for Credit Evaluation Services, Scott Golueke
 - Provide subject matter expertise to understand the credit evaluation data and provide guidance in creating the mock-ups and data source documentation for each data need. Provide guidance in UAT and complete testing as available.
- RO Resource: Senior Data Strategist, Phil Hull
 - Lead the creation of data vizzes using Tableau or other tools as needed to take the data out of the DW and produce easy to read and use vizzes for RO leadership. Provide testing during UAT.
- RO Resource: Student Enterprise Application Manager, Leah Meicher

- Facilitate and lead sessions with subject matter experts to design mock-up and data sources for each of the identified data needs. Coordinate testing and validation during UAT.
- RO Resource: Business Analyst, Priya Sachithanandam
 - Assist in aligning business processes to the design of each data need. Assist in testing and collecting test results during UAT.

6 PROJECT MILESTONES/DELIVERABLES

The following is the desired (critical path) timeline, major milestones, and deliverables for the project:

Milestone/Deliverable	Responsible	Date
Requirements/Design/Use Cases Established for Phase 1	Core Team	6/2/2020
Project Charter Approved	Nicole/Kelly	6/4/2020
Review & Approval of Requirements/Design/Use Cases for Phase 1 Complete	Clare, Scott, Jeff, Rao, Kay	6/18/2020
Phase 1 Warehouse Design Complete	Rao	6/24/2020
Phase 1 Development Complete	Kevin	7/21/2020
Phase 1 Internal Testing Complete	Kay, Rao, Kevin	8/19/2020
Review & Approval of Requirements/Design/Use Cases for Phase 2 & 3 Complete	Clare, Scott, Jeff, Rao, Kay	8/25/2020
Requirements/Design/Use Cases Established for Phases 2 & 3	Core Team	9/17/2020
Phase 1 UAT Complete	RO SMEs	10/2/2020
Phase 1 Deployment Complete	Rao, Kevin	10/13/2020
Phase 2 Warehouse Design Complete	Rao	10/28/2020
Phase 2 Development Complete	Kevin	11/24/2020
Phase 2 Internal Testing Complete	Kay, Rao, Kevin	12/17/2020
Phase 2 UAT Complete	RO SMEs	2/9/2021
Phase 2 Deployment Complete	Rao, Kevin	2/17/2021
Phase 3 Design Complete	Rao	3/5/2021
Phase 3 Development Complete	Kevin	4/1/2021
Phase 3 Internal Testing Complete	Kay, Rao, Kevin	4/21/2021
Phase 3 UAT Complete	RO SMEs	5/20/2021
Phase 3 Deployment Complete	Rao, Kevin	5/28/2021
Project Close-out Activities	Nicole/Kelly	6/8/2021
Project Complete	All	6/8/2021

7 PROJECT CHANGE CONTROL

Upon completion of project planning, all baselines will be set. Any changes that are requested once in execution will be presented to the Steering Committee for a decision. The project manager has overall responsibility for executing the change control process for each change request.




7.1 Constraint Prioritization

During planning, and when analyzing any potential project changes, the following importance prioritization has been established.

1. Scope: Scope will be outlined in project planning. As the project moves through execution, scope may need to be re-evaluated and any change will be reviewed by the steering committee for approval.
 2. Schedule: Priority level 1 needs shall be completed by 9/1/2020. Priority level 2 needs shall be completed by 12/30/20. Priority level 3 needs shall be completed by 6/30/21.
 3. Budget: The budget is made up of all centrally funded internal resources.
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8 PROJECT AUTHORIZATION

By acceptance of this project charter, I/We verify the document has been reviewed and authorize the project start.

Scott Owczarek, Office of the Registrar, Division of Enrollment Management – Project Sponsor	Date
	6/23/2020
Phil Hull, Senior Data Strategist, Office of the Registrar, Division of Enrollment Management – Project Owner	Date
 	6/23/2020
Nicole Olthafer, Project Manager, DoIT-Academic Technology & Kelly Schumann, Project Manager, ODMAS	Date
