



**PROJECT CHARTER**  
**DEPARTMENT PLANNING PROFILES & ACADEMIC STRUCTURE RETROFIT**

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**Approved By:** Jocelyn Milner (11/08/2019)

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**Version Control** – This document supersedes all previous versions.

Version	Date	Author	Change Description
	10/1/2019	Kelly Schumann	Document created
1.0	10/28/2019	Kelly Schumann, Kay Steiner	Fleshed out overview, scope, and goals
1.1	10/30/2019	Kay Steiner	Edited overview, scope, and goals

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**PROJECT BACKGROUND AND OVERVIEW**

The Department Planning Profiles (DPP) is a by-department tabulation of 300+ department-level metrics including faculty/staff data, enrollments, credits, degrees, research, budget, and

expenditures. It is a useful resource of academic activity in relation to the budget and for identifying trends for strategic or academic planning and program review.

The academic structure is a representation of academic actions approved through governance and should be used as the single source of truth for approved governance actions. Each component of the academic structure has a foundation in policies from the UW System Board of Regents, UW–Madison Faculty Policy and Procedures, and accreditation bodies. The official academic structure is maintained in the Student Information System (SIS) and is accessed electronically through the data extracts from the InfoAccess data warehouse.

Responsibility for maintaining the academic structure in the single source of truth is shared between APIR and the Office of the Registrar.

Having a single, codified source for information about the academic structure:

- Makes it clear how schools and colleges are related to departments, how departments are related to academic plans and subplans, and how departments are related to curricular subjects.
- Defines how elements of the academic structure are related to budgetary units.
- Enables the electronic connection between data systems that consume the academic structure and saves the time and resources that would be needed to maintain separate systems.
- Ensures consistency in reporting about the academic structure by maintaining a single source of attributes of departments, plans, subplans, and curricular subjects.

The DPP data warehouse structures and dashboards need to be updated to use the new academic structure data, which was built out in InfoAccess 2.0 in 2019. This will impact the identification of academic units as well as the dimensional data models related to academic degrees, enrollments, and credits. Currently, APIR must manually maintain tables used prior to the implementation of the new academic structure in InfoAccess 2.0. The retrofit project will redirect DPP to use the new academic structure tables which will automate the process and allow the manual work of maintaining these tables to be discontinued.

The items that will be addressed during this project are restricted to the elimination of the manual work to maintain the current tables, as there will be a complete redesign of the DPP in 2020-2021 in conjunction with the ODMAS Data Warehouse Cloud Migration project.

## 1.1 Project Team

### Project Management

Project Sponsor	Jocelyn Milner, Vice Provost, APIR
Project Owner	Allison La Tarte, Analyst, APIR
Project Manager	Kelly Schumann

### Core Project Team

ODMAS Lead	Kay Steiner, Business Analyst, ODMAS
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Communications	TBD, APIR
Subject Matter Experts	Clare Huhn, Credits, Sara Lazenby, Academic Awards & Enrollment
Data Architect	Rao Kunche, ODMAS
ETL	Randy Carey & Kevin Musser, Warehouse Developers, ODMAS

**Extended Project Team**

UAT Testers	Allison La Tarte, Clare Huhn, Sara Lazenby
Additional UAT Tester	Kimbrin Cornelius, L&S

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**2 PROJECT SCOPE AND GOALS**

DPP and Academic Structure Retrofit ensures consistency in DPP data and reporting by using the new academic structure (a single source of attributes of departments, plans, subplans, and curricular subjects). DPP will no longer rely on the InfoAccess 1.0 table/views that are maintained manually by APIR, moving closer to being able to retire them.

The DPP Retrofit will also allow the division to pull data for reporting purposes on the new academic structure as we prepare for the DPP redesign planned for 2020-2021. The redesign will address the overall data and reporting issues brought to our attention by campus partners and will allow for more flexible and robust reporting by the division. The larger redesign project will be produced once the data warehouse has completed its migration to the cloud environment.

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**3 CRITERIA FOR SUCCESS**

This project will define success based on the following criteria:

Implementing these changes will allow the campus DPP to continue to run in the current form using new academic structure data (currently manually maintained as part of SIS). The update will provide a seamless update to the relevant tables/views and reports and eliminate the manual processes, freeing time for APIR staff to perform other higher-level duties.

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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):

- Estimates assume there is a straight-forward transition from the current sources to the DPP academic structure data.
- All requirements have been identified upfront.

- ODMAS is not responsible for any report builds. APIR will be responsible for updating all reports or visualizations, documentation, and training.

#### 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.)

- ODMAS data warehouse developers are resource constrained through the end of 2019,

#### 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.)

- Schedule flaws may become apparent and estimates for development time can differ from the plan estimate.
- Scope Creep – DPP Retrofit should cover only the identified requirements, and any others should be held for the DPP Redesign.

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## 5 COSTS AND RESOURCES

The following resources have been identified as required:

- Data Warehouse Developer: 120 hours
- Business Analyst: 30 hours
- Project Owner: 30 Hours
- Subject Matter Experts: 30 hours
- UAT Team: 60 hours

<b>Preliminary Budget</b>	Capital Items:
	Expense Items:
	Labor Costs: 300 hours
	Total estimated costs to complete this project:

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## 6 PROJECT MILESTONES/DELIVERABLES

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

Milestone/Deliverable	Responsible	Date
Gather Requirements	Kay Steiner/Allison La Tarte	11/11/19-12/10/19

Design	Rao Kunché	12/11/19-1/31/20
Build / ETL	ETL Developers	2/3/20-3/16/20
Integration Testing	ETL Developers	3/17/20-4/16/20
UAT Testing	APIR/L&S	4/17/20-5/19/20
Reports & Visualizations Build	APIR	5/20/20-6/9/20
UAT of Reports & Visualizations	APIR & L&S	6/10/20-6/30/20
Communications & Training Developed & Delivered	APIR	7/1/20-7/15/20
Deployment Activities	APIR	7/16/20-7/30/20
Post Implementation Review	Kelly Schumann All	8/3/20-8/13/20



**7 PROJECT CHANGE CONTROL**

The change control process for this project will be completely documented in a project change control plan. Upon completion of project planning, all baselines will be set. Any changes that are requested once in execution will follow the documented change control plan. 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.

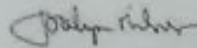
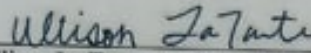
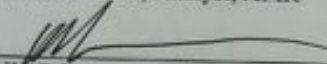
1. ODMAS data warehouse developers are resource constrained through the end of 2019.



Project Charter – DPP Retrofit

**8 PROJECT AUTHORIZATION**

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

	11 8 2019
Jocelyn Milner, Vice Chancellor APIR	Date
	11/8/19
Allison La Tarte, Analyst, APIR	Date
	11/8/19
Kelly Schumann, Project Manager, ODMAS	Date