ITS Executive Steering Committee (ITESC)

Agenda and Materials – June 17, 2021

Agenda

Enterprise Initiative Updates
- Enterprise Texting – J. Drevs
- Faculty Admin Re-architecture Strategy (FARS) – D. Fitzgerald
- PeopleGrove Student Mentoring – D. Fitzgerald
- CRM Platform for Schools – D. Fitzgerald
- Advancement CRM – D. Fitzgerald
- Data Governance & Integrity - J. Sibenaller

Planning for Future Investments
- S. Malisch

Project Portfolio Prioritization
- S. Malisch, J. Sibenaller

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Enterprise Texting

- Recent Activity
  - Contract/MSA – Complete in May
  - University Product Owner – UMC, John Drevs
  - UMC Team – Initial Engagement/Product Demo
  - Client Outreach
    - Wellness
    - Admissions/Enrollment Operations
    - Athletics
    - Human Resources
    - Student Academic Services
   - Student Development

- Next Steps
  - Oversight Committee for Policy & Process, Create Draft Membership
  - Prioritization of departments/activities
  - Determine systems integration needs
  - Training of departments/teams
  - Initial live goal of July/August

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Enterprise Texting – Draft Dept. Priorities

Priority	Department	Contact	Alt Contact	Notes
1	Univ. Marketing & Communications	John Drevs	Anna Shymanski-Zach	Product and Project Owner
2	COVID-19 Vaccine	Tom Kelly	Jim Sibenaller	Campaign to get people to upload vaccine cards
3	Wellness	Joan Holden	Teresa Carey	Reminders for required immunizations
4	COVID-19 Testing Compliance	Kana Henning	Maciek Nowak	Reminders for testing during the week
5	Advancement/Donor Relations	Karen Paciero	Michael Halverson	Send $$ now option, donor outreach
TBD	Student Academic Services	Lester Manzano		Potential uses outside of EAB Navigate being researched. Initial discussion held.
TBD	Athletics	Steve Watson		Discussion being scheduled
TBD	Human Resources	Winifred Williams		Discussion being scheduled
TBD	Student Development	Jane Nuefeld		Discussion scheduled for 6/22
TBD	Admissions	Paul Roberts	Tim Heuer	GPEM likely will continue to use SLATE

Faculty Admin Re-architecture Strategy (FARS)

Faculty Administration Re-Architecture Strategy Timeline - 6/14/2021
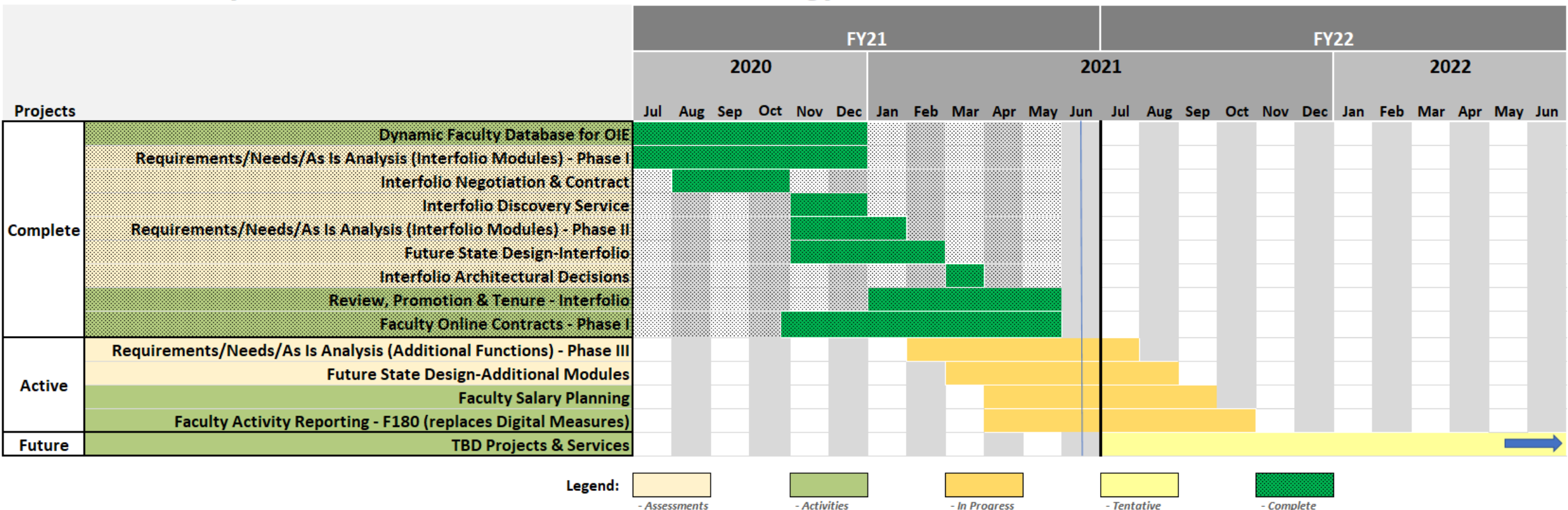
FARS Metrics

Review Promotion & Tenure (RPT)

RPT Metrics
- RPT Training - 148 admin, 199 faculty, 95 staff
- 108 active promotion and tenure cases to date

Comments Received
- Positive remarks mentioned during the RPT training
- Several faculty asked whether we could have a similar platform for FAS
- SSOM Clinical and Basic Science Chairs are pleased with Interfolio
- Glad to have a platform to house the materials in one secure place as well as access by candidates, chairs and administrators
- New SSOM promotion and tenure guidelines

Online Contracts

Health Sciences Campus

Faculty Count	948
Contract Record Created	845
Contract Approved by Administration	1932
Contract Email Sent	794
Contract Email Viewed	433
Contract Email Link Clicked	337
Faculty Viewed AC	761
Faculty Viewed CC	578
Faculty Has CC	699
Faculty Accepted	741
Faculty Rejected	1
Awaiting Faculty Action	52
Faculty Has Manual Contract	83
Budget Changed After Contract	91
Flagged Contract	7

Lakeshore Campuses

Faculty Count	720
Contract Record Created	708
Contract Approved by Administration	692
Contract Email Sent	691
Contract Email Viewed	617
Contract Email Link Clicked	0
Faculty Viewed AC	610
Faculty Viewed CC	0
Faculty Has CC	0
Faculty Accepted	554
Faculty Rejected	0
Awaiting Faculty Action	137
Faculty Has Manual Contract	15
Budget Changed After Contract	22
Flagged Contract	12

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PeopleGrove – Loyola Mentors Year One

- 1,037 total users

- 3,201 messages sent

- 60% of users are mentors for students

- 4.65 average connection rating out of 5

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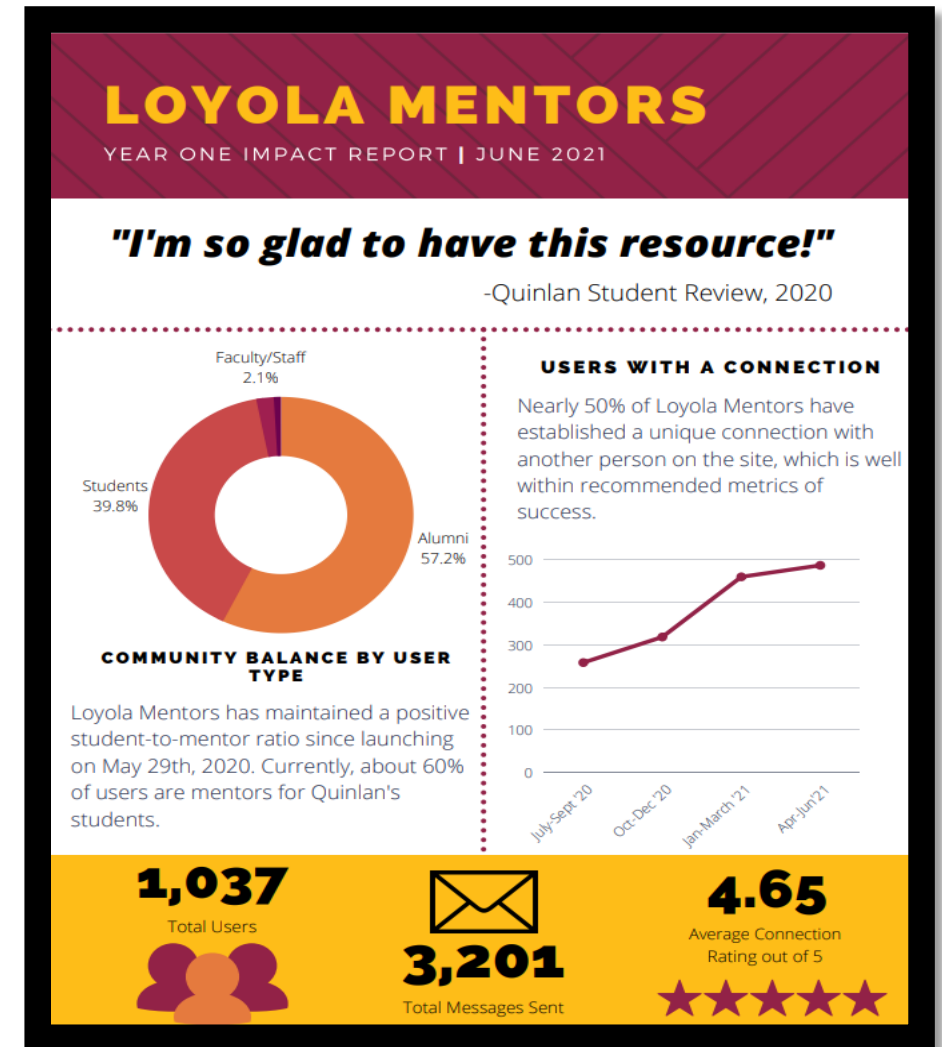
PeopleGrove Student Mentoring

- Recent Activity
  - Design Approach Approved
    - Design consists of a Central Hub for *all students and all alumni* administered by Career Services
    - Implement Sub Hubs administered by the schools having unique mentoring requirements separate from the Central Hub students and alumni setup (ex. QSB, The Law School and SSOM).
  - Central Hub owner and administrator – Career Services, TBD
  - SSOM Sub Hub
    - Project Intro call held with PeopleGrove on 5/11 with demo on 6/2
    - SSOM – Student Affairs will lead the implementation

- Next Steps
  - Finalize pricing and execute order forms for additional Hubs
  - Implement Central Hub
  - Connect QSB Sub Hub to Central Hub
  - Implement SSOM Sub Hub – Target Go Live July
  - Prioritization of remaining schools

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PeopleGrove Pricing & Proposed Cost Sharing Model

PeopleGrove - Staggered Pricing Model (5 Hubs)	FY22	FY23	FY24	FY25	FY26	
Core Platform - Central Hub - no discount on Hub #2 - Tier 3 pricing $40,000 - assuming 2% rate increase on annual support	$40,000	$40,800	$41,616	$42,448	$43,297	
Core Platform - Sub Hubs for SSOM, Parkinson School - 2 Hubs at 20% discount - Tier 1 pricing $12,000 per Hub - assuming 2% rate increase on annual support	$24,000	$24,480	$24,970	$25,469	$25,978	
Core Platform - Sub Hub for Law School and MNSON - 1 Hub at 20% discount - Tier 1 pricing $12,000 -1 Hub at 33% discount - Tier 1 pricing $10,050 - assuming 2% rate increase on annual support		$22,050	$22,491	$22,941	$23,400	
One Time Implementation Fee ($5000 per Hub)	$15,000	$10,000				
Add-On (each add on is $3333 - plan for one add-on per Hub - 5 total, fixed cost)	$9,999	$16,665	$16,665	$16,665	$16,665	
						5 Year Total
Total	$88,999	$113,995	$105,742	$107,523	$109,340	$525,599

PeopleGrove - All-at-Once Purchasing Pricing Model (5 Hubs)	FY22	FY23	FY24	FY25	FY26	
Core Platform- Central Hub - 33% discount - Tier 3 pricing $26,800 - assuming 2% rate increase on annual support	$26,800	$27,336	$27,883	$28,440	$29,009	
Core Platform - 4 Sub Hubs - 33% discount $10,050 per Hub -assuming 2% rate increase on annual support	$40,200	$41,004	$41,824	$42,661	$43,514	
One Time Implementation Fee ($5000 per Hub)	$25,000					
Add-On (each add on is $3333 - plan for one add-on per Hub - 5 total, fixed cost)	$16,665	$16,665	$16,665	$16,665	$16,665	
						5 Year Total
Total	$108,665	$85,005	$86,372	$87,766	$89,188	$456,996
				Savings of All-at-Once versus Staggered		$68,603

Recommendation:
All-at-Once Purchase (5 hubs) using Cost Sharing Model with Schools
- ITS covers annual costs for:
  - Core Platform (2% annual uplift)
  - One Add-on/hub
- Schools cover annual costs for:
  - $10,500/hub (ongoing with 2% annual uplift)
  - Incremental add-ons (optional)
  - $5,000 implementation (one-time)
- OR Provost Office covers one-time implementation fees for all schools

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CRM Platform for Schools

- Recent Activity
  - MNSON agree to participate in a pilot implementation of Slate's CRM module
  - Requirements review meeting held 6/1
  - Demo of Slate held on 6/9
  - Meeting held with Tim Heuer from ESRR on 6/10 to discuss implementation approach

- Next Steps
  - MNSON finalize CRM requirements
  - Meeting to be scheduled between Technolutions, ITS and ESRR to finalize implementation design

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Advancement CRM

- Recent Activity
  - Met with Gartner to better understand solutions market, RFP/implementation partners, and to validate estimated timing and costs
  - CRM RFP process for vendor selection approved and will be led by a consulting partner in the alumni advancement system market.

- Next Steps
  - Schedule meeting to identify 3-4 consulting partners for RFP and Implementation proposals
  - Request vendor proposals and select consulting partner

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Data Governance & Integrity - Goals

- Advance the current Data Governance practices

- Establish Data Governance policies and procedures

- Assess the current state of demographic and contact information

- Document key source systems and dependencies

- List definitions of Data Quality components and items

- Describe a Data Quality approach

- Identify a Data Quality solution

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Overview

Data Governance	Data Quality/Integrity
Data Governance is a collection of practices and processes which help to ensure the formal management of data assets within an organization	A Data Quality Program selects a set of data quality polices towards a specific goal or accomplishment
Data Governance is used to express data governance policies uniformly across all enterprise and business concerns	Data Quality works to improve quality and integrity for every impacted data component
Data Stewardship is used to align best practice and create consistent process across all subject areas of data	Data Quality Scope: • intake/entry • enhancement/augmentation • storage/integration

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Program Assumptions

- Advice and best practices will be crafted to extend the our Data Governance practice
- Data Quality near-term effort is to clean and manage quality for 2 types of data
  - Demographic (Name, Address, Date of Birth, etc.)
  - Contact (Email, Phone, Permanent address) information
- Initial phase limited to the Lakeside systems – Health Sciences data, outside of faculty data, will be in a future phase
- This effort will seek to ensure the data quality of current and future information collected
- The current effort is not concerned on the technology used to store or transmit information between systems
- This effort will put in place a level of Data Quality processes and controls to meet near-term issues
- The program may grow as the needs of Loyola grows
- Identify the system of record and source of truth

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Sourcing Systems Identified

Key Source Systems
Identity Access Management (LUWARE) – The creation and management of Loyola ID (LID) and UVID/email for Student, Faculty, Staff and Non-Associated Persons
SLATE/LOCUS – Student Administration
ADVANCE – Alumni & Giving Administration
LAWSON/People Admin – Faculty/Staff Administration
Online Directory – Faculty/Staff Information Lookup
FIS – Faculty Information System
NAP – Non-Associated Person Administration

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Initial Fields in Scope

Student, Faculty, Staff, NAP, Alumni, Parent - Demographic, Contact, & Identity information

Name (First, Last)	Primary Role (HI Role) Student, Faculty, & Staff, Guest, Contractor
Preferred Name	
Parent Name	
Address – Permanent & Local	
Email (UVID)	
Date of Birth	
Phone - Home	
Phone - Mobile	
Identity	Employee ID (UVID) - Loyola ID (LID)
Department (if applicable)	
Supervisor (if applicable)	
Location (Student Worker, Faculty, Staff)	

Program Deliverables

Data Quality/Integrity
1. Potential Data Quality program approaches and options
2. Data flows of impacted sourcing systems
3. Data Quality solution approach for demographic and contact info
4. Data Quality owner/contact list
5. Potential Data Governance policies
6. Data Quality & Integrity development rules and processes

Data Governance
1. Data Governance process & approach
2. Data Governance assessment questions & outcomes
3. Data Governance maturity model
4. Business glossary recommendations-business rules and definitions of impacted critical data elements
5. Data Dictionary for glossary of terms and definitions
6. Metadata dictionary recommendations – technical definitions, implementations and integrations

Data Governance & Integrity Steering Structure
1. Data Governance & Integrity Steering Structure

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Milestones

Phase	Milestone	Estimated Time Frame
Initiation	Internal Kickoff Meeting	Completed
Planning	Core Systems Owners – Introduction	Completed
	Data Flow Charts Reviews	Completed
	Scope Approval	June 2021
Execution	Data Life Cycle Flows	June-July 2021
	Data Quality Solution Approach	June-July 2021
	Draft – Quality Controls, Policies, Rules and Processes	July-August 2021
	Draft – Data Governance Maturity Model	July-August 2021
	Draft – Data Governance & Integrity Steering Structure	July-August 2021
	Business Glossary & Data Dictionary	July-August 2021
	Internal Reviews and Modifications	September 2021
	Stakeholders Reviews and Updates	September 2021
Close-out	Transition to Operational Model	October 2021

Project Oversight

PSS 3398
Data Governance & Integrity Program

Executive Sponsors
ITS
HR
Provost
Finance

Executive Steering Committee

Program Office
Tony Vavarutsos – *ITS Sponsor/Program Manager*
David Slavsky,(Brian Erdman) – *Business Sponsor*

Jim Sibenaller
Program Consultant

Data Specialists
Malle Kancherla – *Project Manager*
Michael Gorecki – *Data Governance SME*

LAWSON
Human Resources
People Admin

LOCUS /
PeopleSoft
EAB

Identity
Management
Active Directory

Security & NAP
Mgmt

Infrastructure

Enrollment
Operations / Slate

Faculty
Information
System

Office of
Institutional
Effectiveness

Online Directory

Advancement

LUWARE

Legend: | Oversight | Execution | Informed | Data Sources

6/15/2021 vers 1.3

Data Governance & Integrity – Next Steps

Seeking approval from the ITESC on Scope

Key Next Steps
- Finalize Executive Sponsors
- Identify Data Stewards/Functional Subject Matter Experts for each data source
- Create Communication Plan & Schedule
- Continue Milestone Efforts

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Planning for Future Investments

Planned Major Initiatives	FY22 (Placeholder)	FY23 (Placeholder)	FY24 (Placeholder)	FY25 (Placeholder)
Conference Services RFP	TBD			
School/Unit CRM Platform Growth		$ 100,000		
Community Engagement Platform	$ 20,000			
Electronic Research Administration System		$ 1,500,000	$ 1,500,000	
Student Experience Technology Strategy		$ 500,000	$ 500,000	
SSOM Admissions Replacement	$ 500,000	$ 500,000		
Advancement RFP	$ 1,000,000	$ 1,500,000	$ 1,500,000	
Finance/HR ERP Replacement		$ 2,000,000	$ 2,000,000	$ 1,000,000
Student System Move to Cloud			$ 1,000,000	$ 1,000,000
TOTAL	**$ 1,520,000**	**$ 6,100,000**	**$ 6,500,000**	**$ 2,000,000**

Unsubstantiated placeholder estimates taken from "Looking Ahead" section in 2021-03-18 SFPT ITS FY22 Summary Final.doc

Additional planning placeholders are TBD related to Loyola Digital Experience and University Strategic Plan priorities with potential budget impact for:

- Portal Concept
- Identity and Access Management

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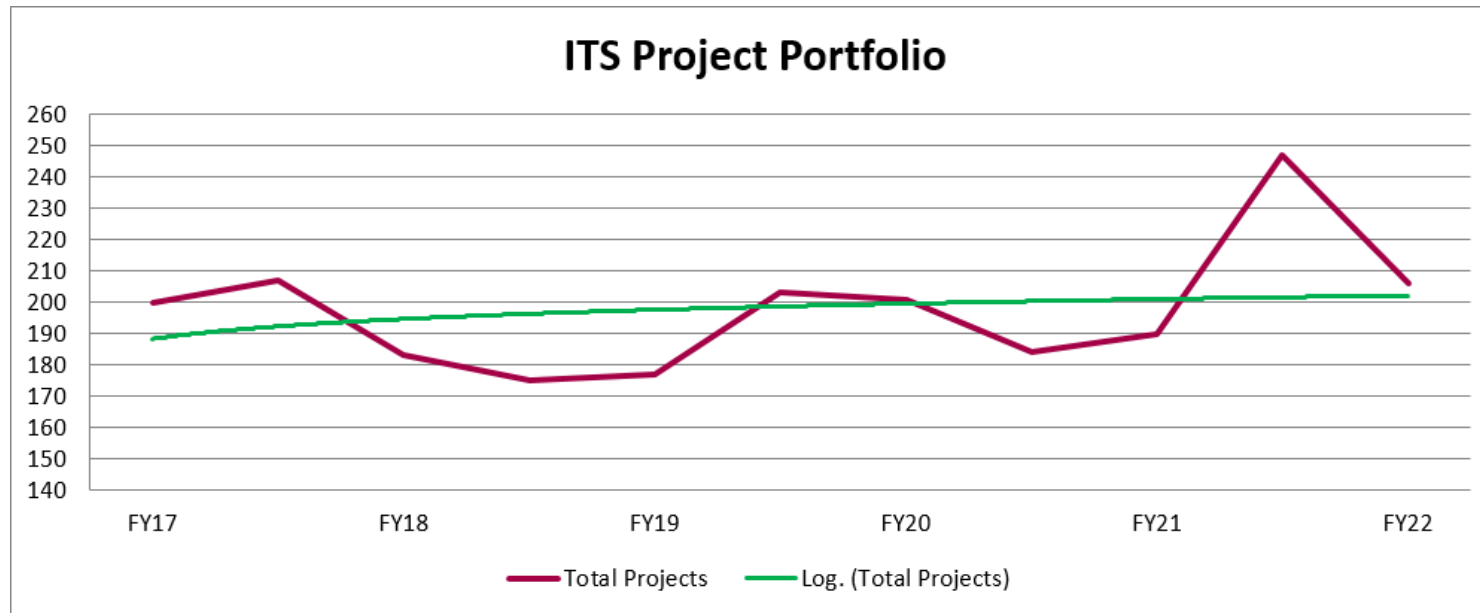
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Plan of Record Tracking

POR Activity	Total Count	T-Shirt Sizing Breakdown						
		XX-Large	X-Large	Large	Medium	Small	X-Small	XX-Small
Original FY21 Q3-Q4 POR	247	18	18	46	93	62	5	5
Revised FY21 Q3-Q4 POR	247	16	20	47	91	63	5	5
New Projects Started	255	1	4	14	36	71	30	99
Final FY21 Q3-Q4 POR	502	17	24	61	127	134	35	104
Completed Projects	(225)	1	4	11	26	62	26	95
Forecasted Completed Projects	(26)	0	1	3	7	7	1	7
Duplicate/Canceled/Move to Ops	(52)	0	4	5	18	19	5	1
Rollover Projects	199	16	15	42	76	46	3	1
New Projects not Started	7	0	1	2	3	1	0	0
FY22 Q1-Q2 POR (Draft)	206	16	16	44	79	47	3	1
Net Change	(41)	(2)	(2)	(2)	(14)	(15)	(2)	(4)

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Project Sizing Trend

Portfolio Counts

T-Shirt Sizing	Work Effort	FY17 Q1-Q2	FY17 Q3-Q4	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
TBD	TBD	0	0	0	0	0	0	0	0	0	0	0
XX-Small	< 3 Days	0	0	0	0	0	0	0	0	0	5	1
X-Small	3-5 Days	4	4	2	1	1	4	3	2	3	5	3
Small	5-30 Days	49	48	36	31	40	50	45	41	42	62	47
Medium	31-60 Days	94	98	96	92	94	96	97	86	83	93	79
Large	61-120 Days	36	37	34	36	31	35	34	36	40	46	44
X-Large	121-180 Days	17	20	15	15	11	18	22	19	22	18	16
XX-Large	>180 Days	0	0	0	0	0	0	0	0	0	18	16
	Portfolio	200	207	183	175	177	203	201	184	190	247	206
	Completed	57	54	44	58	55	49	77	60	118	225	

ITS Project Portfolio

Legend: Total Projects, Log. (Total Projects)

	Avg.	Min	Max	This Period
Portfolio	197	175	247	206

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Average Project Size

ITS Project Size (in FTE)

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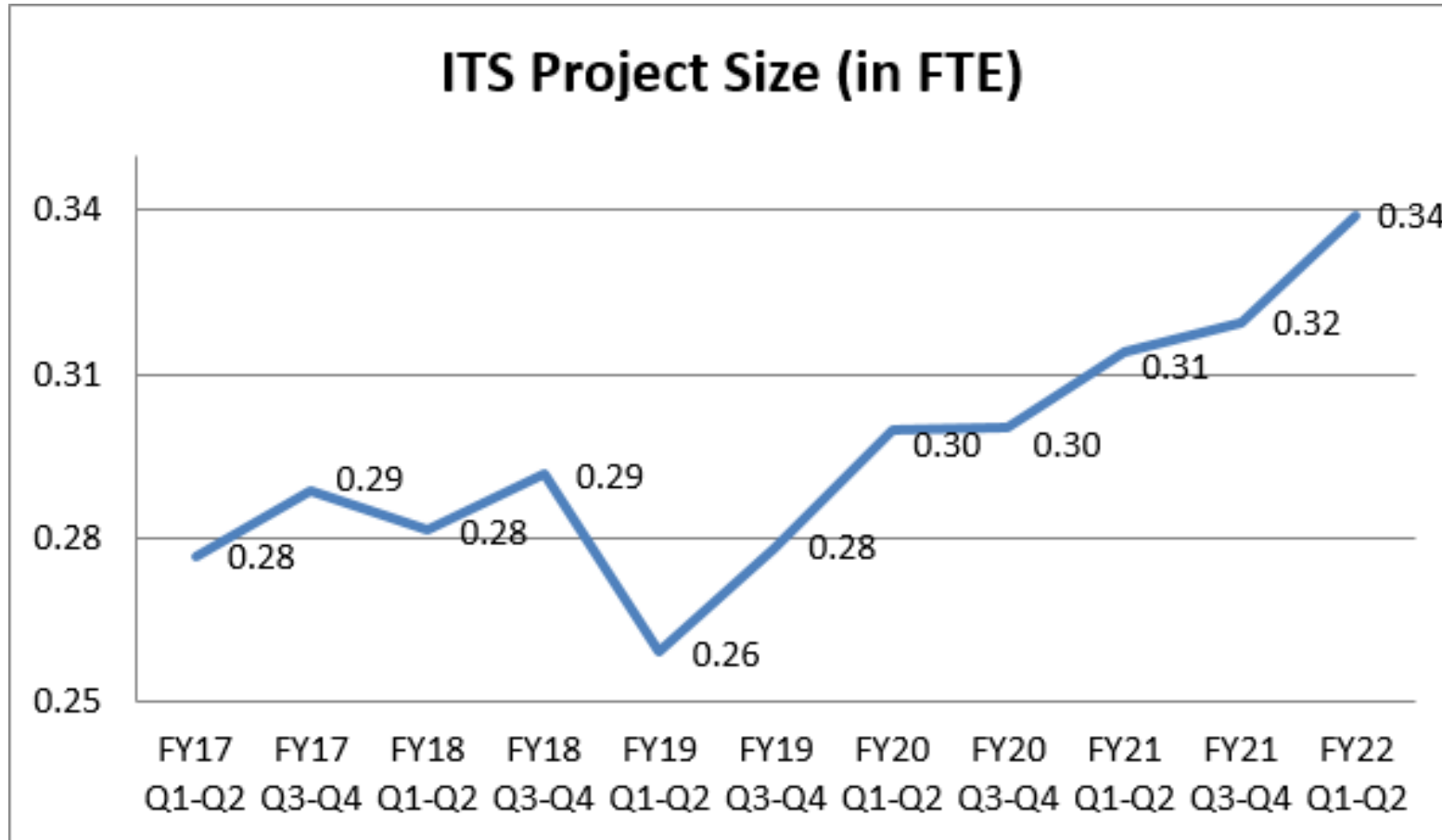
Completed Project Forecast

Portfolio Completion Pct
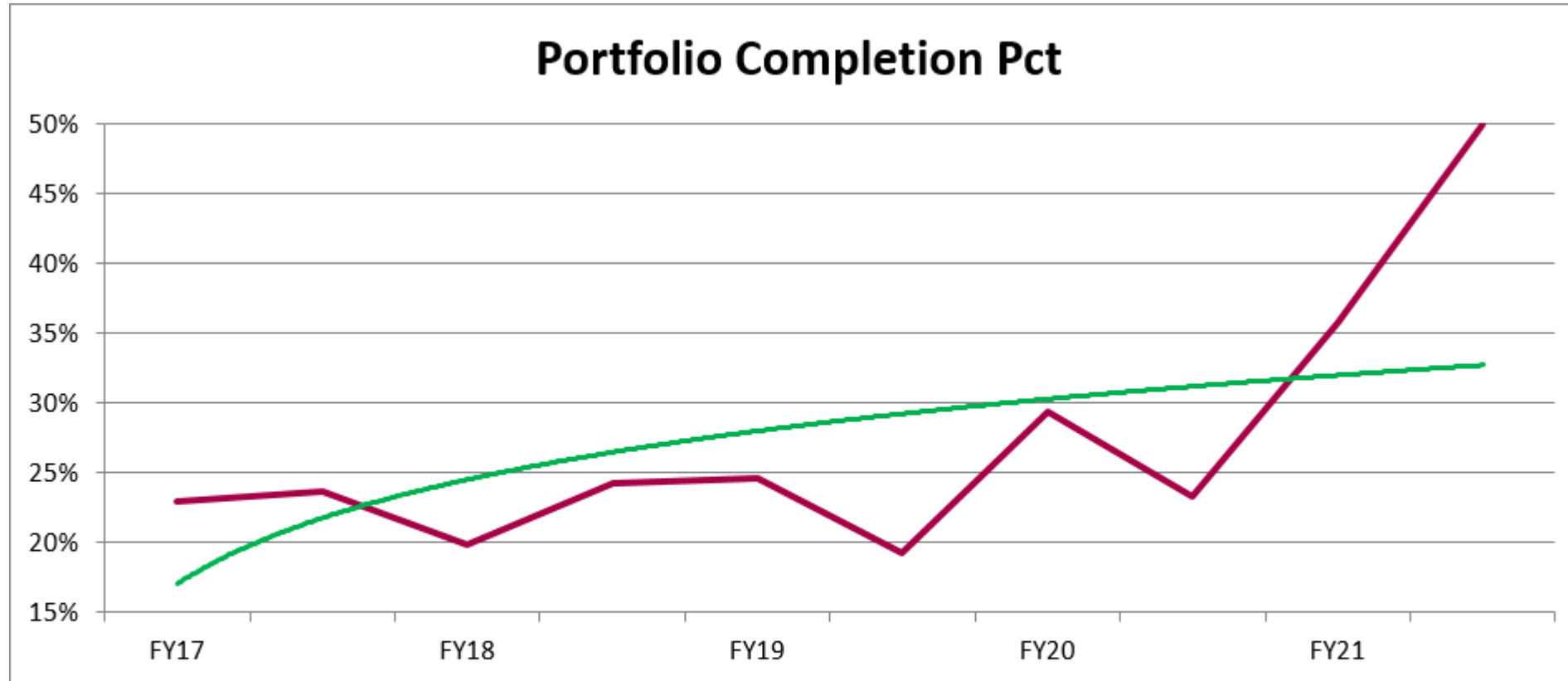
225 projects complete

26 projects forecast to be complete

251 total completed this period

	Avg.	Min	Max	This Period
Completed Pct.	27%	19%	50%	50% (forecasted)

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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	1	0.004	Full Time	119.0	Admin.	27.7	23%	**44%**
X-Small	3-5 Days	3	0.04	Part time	2.1	Support	49.2	41%	
Small	5-30 Days	47	4.2	Total FTE	121.1	COVID-19 Support***	4.9	4%	
Medium	31-60 Days	79	15.2			Research	5.7	5%	
Large	61-120 Days	44	16.9			Projects	33.6	28%	
X-Large	121-180 Days	16	9.6			Total	121.1	100%	
XX-Large	>180 Days	16	23.9						
	Total	206	69.9						

*** COVID-19 support reduced 50%

* snapshot as of 6/11/2021
** most likely scenario

FY22 Q1-Q2 Estimated Resource Gap
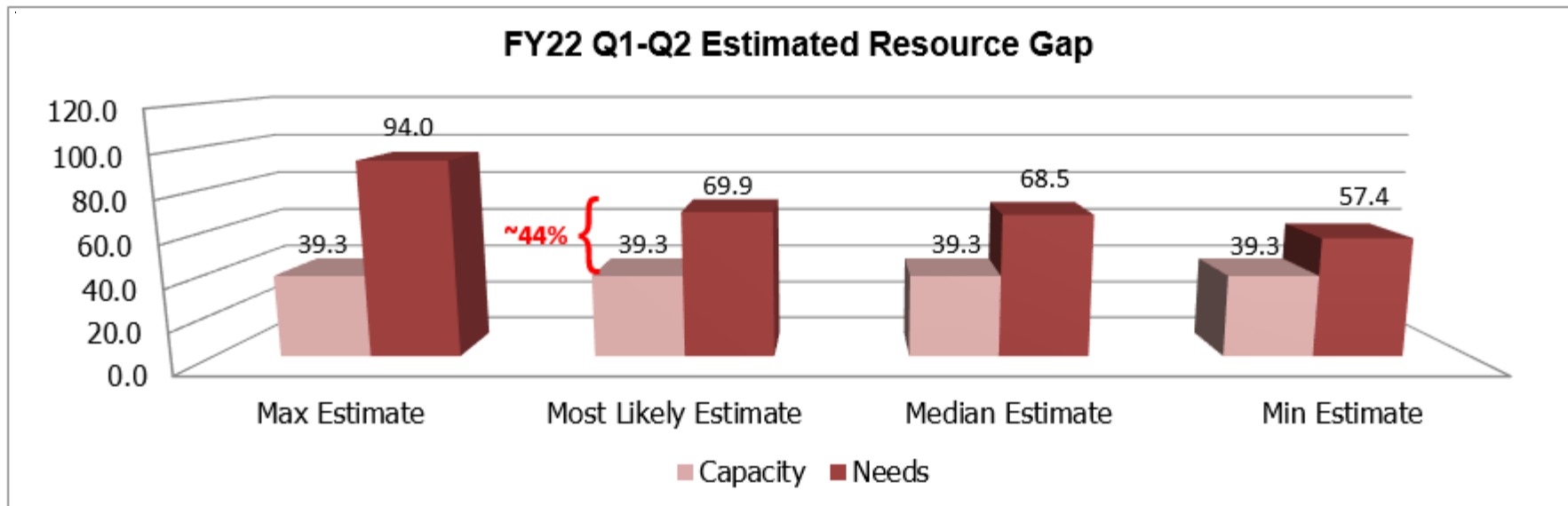
Portfolio Growth Details

	FY17 Q1-Q2	FY17 Q3-Q4	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	5 Year Avg
Portfolio Count	200	207	183	175	177	203	201	184	190	247	206	198
Portfolio Growth	9%	4%	-12%	-4%	1%	15%	-1%	-8%	3%	30%	-17%	
Most Likely Work Effort	55.3	59.7	51.5	51.0	45.8	56.5	60.3	55.2	59.6	78.9	69.9	58.5
Most Likely Work Effort Growth	13%	7%	-16%	-1%	-11%	19%	6%	-9%	7%	24%	-13%	
ITS Project Capacity	32.2	31.5	31.5	31.5	31.0	30.4	31.7	32.1	31.5	32.7	39.3	32.3
ITS Project Capacity Growth	-20%	-2%	0%	0%	-2%	-2%	4%	1%	-2%	4%	17%	
Estimated Resource Gap	42%	47%	39%	38%	32%	46%	47%	42%	47%	59%	44%	45%

ITS Project Portfolio Resource Gap

ITS Project Portfolio Resource Gap
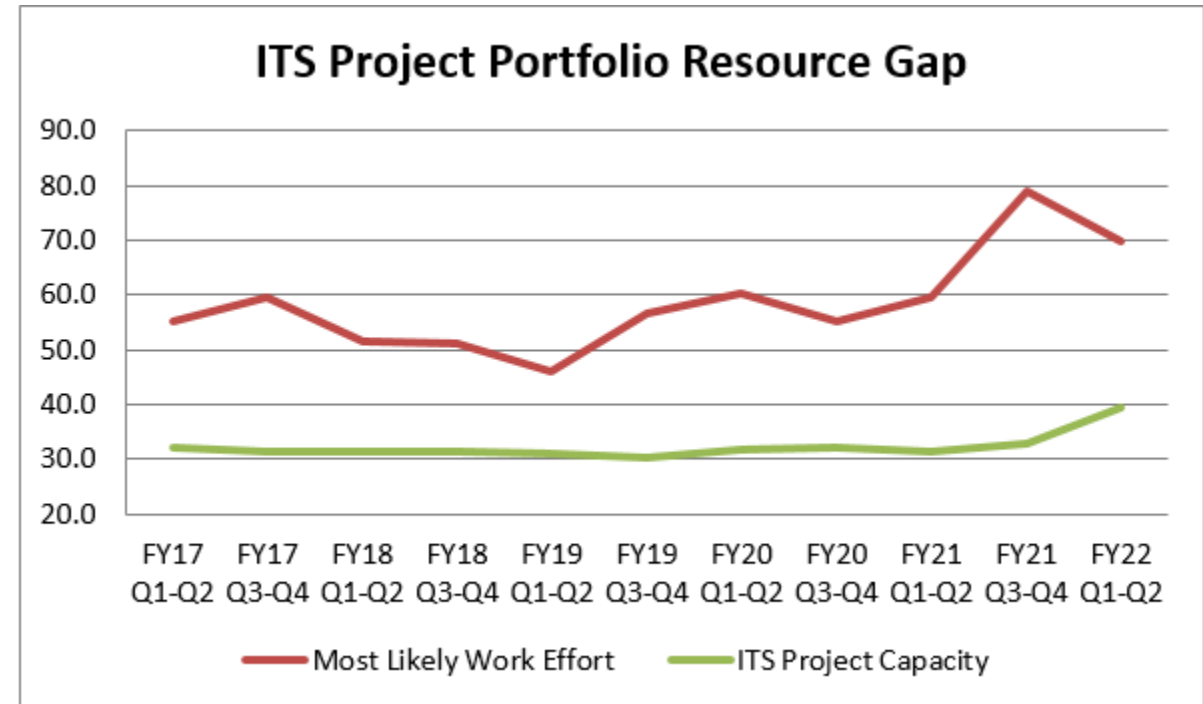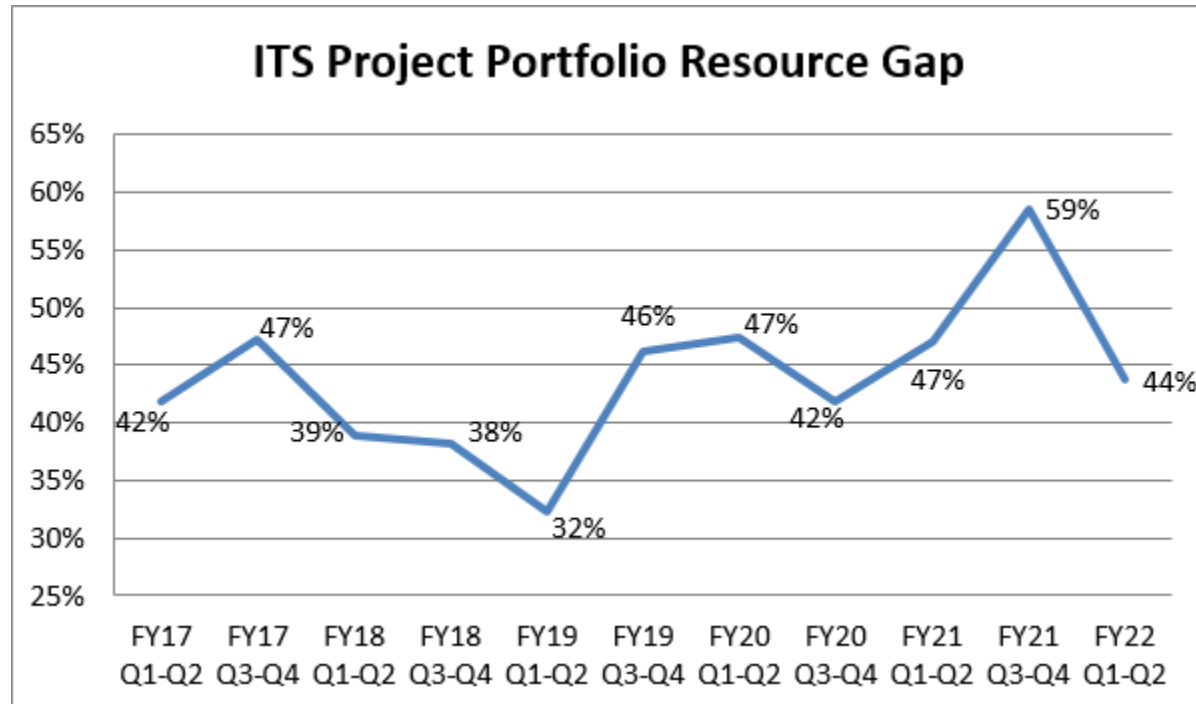
ITS Project Portfolio Impact

Portfolio Strategic Breakdown - History

	Run	Grow	Transform
FY18 Q1-Q2	75%	17%	8%
FY18 Q3-Q4	74%	18%	8%
FY19 Q1-Q2	76%	17%	7%
FY19 Q3-Q4	76%	16%	8%
FY20 Q1-Q2	77%	15%	8%
FY20 Q3-Q4	76%	16%	8%
FY21 Q1-Q2	76%	15%	9%
FY21 Q3-Q4	76%	15%	9%
FY22 Q1-Q2	75%	15%	10%
Best Practice 2020 - HE	78%	14%	8%
Best Practice 2019 - HE	80%	14%	6%
Best Practice 2018 - HE	76%	18%	6%
Best Practice 2017 - HE	75%	17%	8%
Best Practice 2016 - HE	73%	16%	11%

Legend: ■ Run ■ Grow ■ Transform
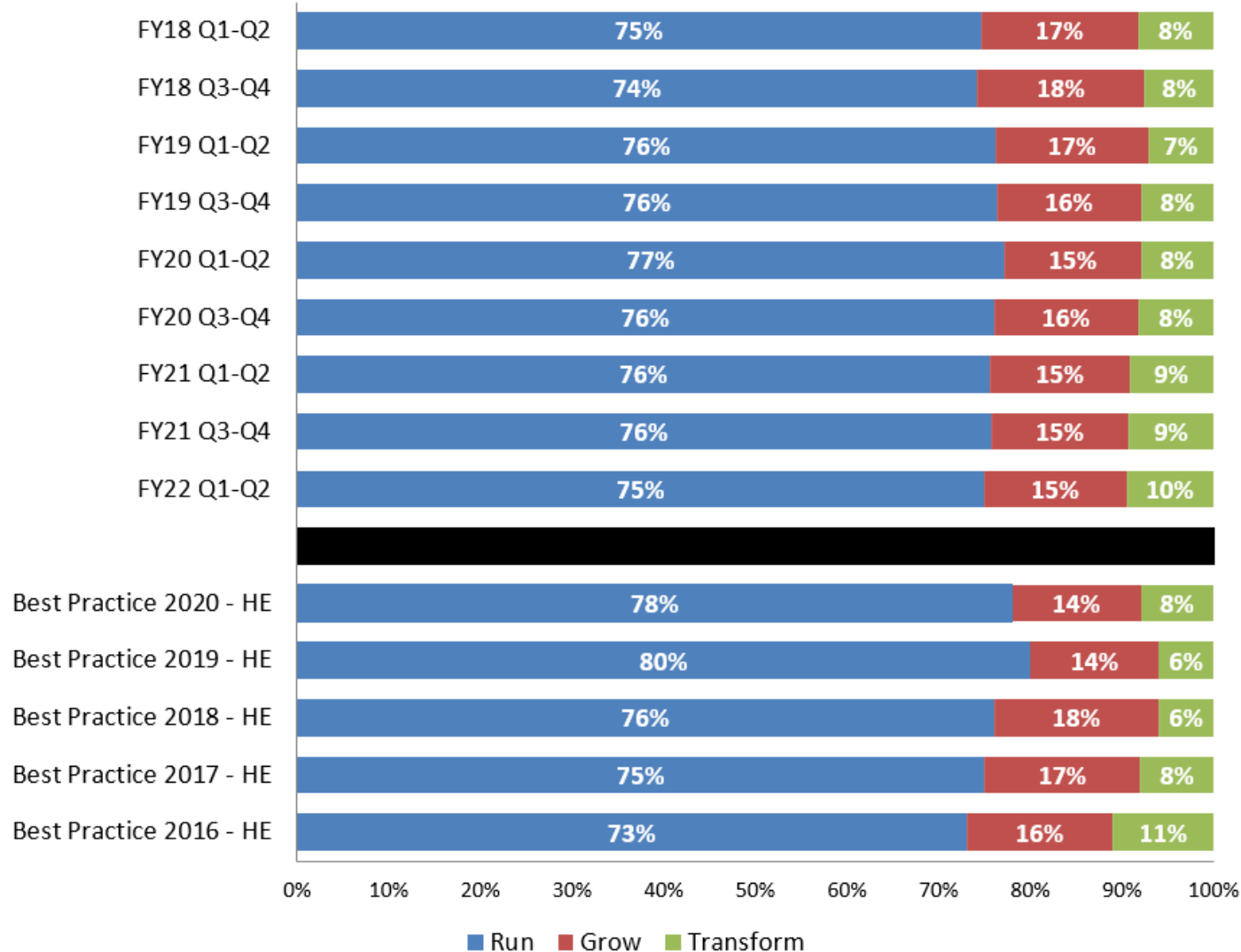
Run – Ongoing operations

Grow – Information systems and services to optimize performance

Transform – New technologies and processes that fundamentally promote change

Excludes research projects

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FY22 Q1-Q2 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	1-5	**LOCUS Enhancements (5)**	**Large**	**Active**	**TBD**	**Enterprise/Multiple**
A	1	Rollout of WHAT-IF Report for Students, Faculty, and Advisors	Medium	On Hold	TBD	Academic Advising and Services
A	2	LOCUS immunizations module - Modify compliance tracking / enhance reporting	Medium	Active	Q1 FY22	Wellness Center
A	3	Upgrade PayPath Credit Card Payment Software in LOCUS	Small	Active	Q1 FY22	Treasurer
A	4	FA - Annual Student Loan Acknowledgement	Medium	On Hold	Q4 FY22	Financial Assistance
A	5	Financial Aid - Loans/ Disbursements 2021-22 Aid Year	Large	Active	Q4 FY22	Financial Assistance
	6-11	**Information Security Program (6)**	**XXLarge**	**Active**	**Q2 FY23**	**Enterprise/Multiple**
A	6	High Security Lab Environment/Security Operations Center	Medium	Active	Q3 FY23	Information Technology Services
A	7	Broaden Use of SIEM Technologies	Large	Active	Q3 FY22	Information Technology Services
A	8	Data Center Firewalls	XXLarge	Active	Q2 FY22	Information Technology Services
A	9	2020 Risk Assessment	Large	Active	Q1 FY22	Information Technology Services
A	10	SCAP Deployment	XLarge	Active	Q1 FY22	Information Technology Services
A	11	2021 Security Assessment	Medium	Pending	Q2 FY22	Information Technology Services
	12-16	**IT Disaster Recovery (5)**	**XXLarge**	**Active**	**Q2 FY22**	**Enterprise/Multiple**
A	12	Disaster Recovery Planning	XLarge	On Hold	Q2 FY22	Information Technology Services
A	13	Disaster Recovery - TouchNet Paypath/TPG	Small	Active	Q1 FY22	Information Technology Services
A	14	Business Continuity for Departmental Staff	XXLarge	On Hold	Q2 FY22	Information Technology Services
A	15	Network Services (Core) Disaster Recovery Plan	Medium	Active	Q1 FY22	Information Technology Services
A	16	2021 DR Plan Review & Testing	Large	Pending	Q2 FY22	Information Technology Dy Services

FY22 Q1-Q2 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	17-20	**Enterprise Content Management (4)**	**Large**	**Pending**	**TBD**	**Enterprise/Multiple**
A	17	ECM - Electronic Document Retention	Large	Hold	TBD	Information Technology Services
A	18	Accounts Payable to Treasury/Cash Management - Foreign Invoices	Small	Hold	Q2 FY22	Accounts Payable
A	19	HSC - Faculty Admin	Medium	Hold	Q2 FY22	Faculty Administration
A	20	DocFinity webforms/automated workflows that perform transactions in LOCUS	Large	Pending	TBD	Registration & Records
	21-26	**Business Intelligence/Data Warehouse Program (7)**	**XXLarge**	**Active**	**TBD**	**Enterprise/Multiple**
A	21	Student Profile - Power BI	Large	Hold	TBD	Student Development - Office of VP
A	22	BI for Student Finance	XLarge	Hold	TBD	Finance-Office of VP-CFO
A	23	Develop an HR BI Dashboard, starting with key reports and metrics	XLarge	Active	Q1 FY22	Human Resources
A	24	Revenue to Expense Model - Version 4	XLarge	Hold	TBD	Finance-Office of VP-CFO
A	25	Financial Aid Suite of Power BI Dashboards	XLarge	Hold	TBD	Financial Assistance
A	26	Learning Analytics - Phase 3	Large	Active	Q1 FY22	Information Technology Services
A	27	Anti-Racism Initiative Dashboard	XLarge	Active	Q1 FY22	Academic Affairs, Anti-Racism Initiative
	28-29	**Lawson/Kronos Enhancements (2)**	**Medium**	**Active**	**Q2 FY22**	**Enterprise/Multiple**
A	28	ESS Life Events - Benefits	Medium	Active	Q1 FY22	Human Resources
A	29	PNC Paid Check File and Paid Check File Images Open Check Data Processing	Small	Pending	Q2 FY22	Financial Systems

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FY22 Q1-Q2 ITS COVID-19 Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	30-34 55-56	**COVID-19 Related Projects (7)**	**XXLarge**	**Active**	**Q1 FY22**	**Enterprise/Multiple**
A	30	COVID-19 Emergency Response Management	XXLarge	Active	Q1 FY22	Office of The President
A	31	Tracking and reporting for the CARES funds	Medium	Active	Q1 FY22	Controller
A	32	WorkBright New Hire Onboarding Module implementation	Medium	Active	Q1 FY22	Human Resources
A	33	Loyola Health App	Large	Active	Q2 FY22	Wellness Center
A	34	Remote Work Technology Future State	Large	Pending	TBD	Enterprise/Multiple
B	55	Residence Life-Online Roommate Agreements	Small	Hold	TBD	Residence Life
M	56	LOCUS Immunizations Module - Add COVID-19	Medium	Active	Q1 FY22	Wellness Center

COVID-19 projects represents
- 2.4 FTE total (effort)
- 7% of the ITS project capacity

COVID-19 support represents
- 4.9 FTE total (effort)
- 10% of the ITS support capacity

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FY22 Q1-Q2 ITS Ranked Separately Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
Ranked Separately	A 35-39					
	B 57-62	Research Computing Services (11)	XXLarge	Active	Q4 FY22	Health Sciences/LUHS
A	35	Define Technology Services Supporting Research	Large	Active	Q4 FY22	Information Technology Services
A	36	HashMap technology to support high-performance NLP	XXLarge	Active	Q2 FY22	School of Nursing
A	37	PCORI CAPriCORN 2020 Refresh	XXLarge	Active	Q2 FY22	Public Health Sciences
A	38	Observational Medical Outcomes Partnership (OMOP) Data Mapping for CTSA/ITM	XXLarge	Active	Q2 FY22	Public Health Sciences
A	39	Natural Language Processing (NLP) to Enhance Computable Phenotyping	XXLarge	Active	Q2 FY22	School of Nursing
B	57	Smartphone App for Patients with Chronic Kidney Disease	Large	Active	Q2 FY22	Public Health Sciences
B	58	Expert System in Early Detection/Prediction of Thyroid Cancer	Small	Hold	Q2 FY22	Radiology
B	59	Examination of the association of unhealthy substance use	Medium	Active	Q1 FY22	Surgery
B	60	Pilot/Seed Grant Fund Tracking (InfoReady)	Small	Active	Q1 FY22	Physiology
B	61	Reference Management Technology (EndNote)	Small	Active	Q1 FY22	Physiology
B	62	Provisional Patents: Clinical Natural Language Processing	Large	Active	Q1 FY22	Information Technology Services

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
Ranked Separately	A 40-42					
	B 76-77	Stritch School of Medicine (5)	XXLarge	Active	Q3 FY22	Stritch School of Medicine
A	40	Create Application Relationship Diagram for HSC Systems	Large	Hold	Q1 FY22	Information Technology Services
A	41	Replace Admissions System	XXLarge	Pending	Q3 FY22	Student Affairs - Admissions SSOM
A	42	Exam Administration	XSmall	Active	Q1 FY22	Medical Education
B	76	Continuing Medical Education Tracking	Large	Active	Q1 FY22	SSOM Administration
B	77	LUHS Application Audit and Decommission	Medium	Active	Q1 FY22	LUHS

FY22 Q1-Q2 ITS Project Prioritization Worksheet

Tab	Row Nbr	Program Group	Proposed ITESC Ranking	Prior ITESC Ranking (Revised)	PRB Ranking Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
	43-44	**LDE Foundation: Collaboration and Security (2)**	**1**	1(Tie)	1	**XLarge**	**Active**	**Q2 FY22**	**Information Technology Services**
Priority A	43	Identity and Access Management Enhancements				XLarge	Active	Q2 FY22	Information Technology Services
Priority A	44	Enterprise Mobility Management				Medium	Active	Q2 FY22	Information Technology Services
	45-49	**LDE Consumable Experience (5)**			---	**XXLarge**	**Active**	**TBD**	**Enterprise/Multiple**
		Student Experience Lifecycle (3)	**2**	1(Tie)		**Large**	**Active**	**TBD**	**Enterprise/Multiple**
Priority A	45	Student Mentoring - SSOM Sub-Hub (PeopleGrove)			11	Small	Active	Q1 FY22	SSOM Academic Administration
Priority A	46	Student Mentoring - Central Hub (PeopleGrove)				Medium	Pending	TBD	Career Services
Priority A	47	School Based CRM Pilot with Slate			12	Medium	Active	Q1 FY22	Parkinson/SON
Priority A	48	ITS Portal Pilot			2	Medium	Active	Q1 FY22	Information Technology Services
Priority A	49	LDE Digital Experience: O365 Application Portal Pilot			2	XXLarge	Pending	TBD	Enterprise/Multiple
	50-54	**Faculty Administration Re-Architecture Strategy-FARS (5)**	**3**	2	4	**XXLarge**	**Pending**	**Q1 FY23**	**Provost's Office**
Priority A	50	Faculty Administration Re-Architecture Strategy-FARS				XXLarge	Active	Q1 FY23	Provost's Office
Priority A	51	Faculty Salary Planning				Large	Active	Q1 FY22	Provost's Office
Priority A	52	Faculty Online Contracts Phase II				Medium	Active	Q1 FY22	Provost's Office
Priority A	53	FARS Phase II Requirements and Future State Design				Large	Active	Q1 FY22	Provost's Office
Priority A	54	Faculty Activity Reporting (replaces Digital Measures)				XLarge	Active	Q1 FY22	Provost's Office
Priority A	55	EAB Navigate - Phase II	**4**	4	3	Large	Active	Q1 FY22	Academic Advising and Services

FY22 Q1-Q2 ITS Project Prioritization Worksheet

Tab	Row Nbr	Program Group	Proposed ITESC Ranking	Prior ITESC Ranking (Revised)	PRB Ranking Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
Priority A	**56-61**	**LDE Transformation: Digital Assistant/Chatbots (6)**				**XLarge**	**Active**	**TBD**	**Enterprise/Multiple**
Priority A	56	Chatbot - Human Resources				Medium	Pending	TBD	Human Resources
Priority A	57	Chatbot - Financial Assistance				Medium	Pending	TBD	Financial Assistance
Priority A	58	Chatbot - ITS Service Desk Expansion	**5**	**5**	**5**	Small	Pending	TBD	Information Technology Services
Priority A	59	Chatbot - Academic Advising				Medium	Pending	TBD	Sullivan Center for Student Services
Priority A	60	Chatbot - Student Development				Medium	Active	Q1 FY22	Student Development - Office of VP
Priority A	61	Chatbot - Enrollment Systems				Medium	Active	Q1 FY22	Enrollment Systems
Priority A	62	Advancement CRM RFP	**6**	---	13	Large	Active	Q2 FY22	Advancement/Development
Priority A	63	Data Governance & Integrity	**7**	---	10	XXLarge	Active	Q4 FY22	Enterprise/Multiple
Priority A	64	Enterprise Texting (Cadence)	**8**	---	7	Large	Active	Q1 FY22	Enterprise/Multiple
Priority A	65	Course Catalog and Curriculum Software	**9**	---	9	Large	Active	Q3 FY22	Registration & Records
	66-67	**Travel Mgmt Services (2)**				**XLarge**	**Active**	**TBD**	**Finance/Controller**
Priority A	66	Travel Management (Egencia)	**10**	8	6	Large	Active	Q1 FY22	Financial Systems
Priority A	67	Travel & Expense Management				Large	Hold	TBD	Controller's Office
Priority A	68	Space and Asset Management - Phase II (Archibus)	**11**	13	8	XXLarge	Active	Q1 FY22	Facilities-Office of VP
Priority A	69	Automate HSC Parking/ID Processes	**12**	17	16	Medium	Active	Q1 FY22	School of Nursing
Priority A	70	Arrupe Commencement Data Collection	**13**	---	17	Small	Active	Q1 FY22	University Marketing and Communication

FY22 Q1-Q2 ITS Project Prioritization Worksheet

Tab	Row Nbr	Program Group	Proposed ITESC Ranking	Prior ITESC Ranking (Revised)	PRB Ranking Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
Priority A	71	Replacement of ECSI SALNet (Flywire)	14	21	18	Large	Hold	Q2 FY22	Office of The Bursar
Priority A	72	Dispatch & Incident Tracking Upgrade (ARMS 2020)	15	---	20	Medium	Active	Q1 FY22	Campus Safety
Priority A	73	Athletics Ticketing Replacement for Neulion (AudienceView)	16	---	21	Large	Active	Q1 FY22	Athletics
Priority A	74	HSC WebCheckout Organization Center	17	---	22	Medium	Active	Q1 FY22	Health Sciences Campus
Priority A	75	Review and Evaluate Proposed Research Administration Solutions	18	9	14	XXLarge	Pending	Q4 FY22	Provost's Office
Priority A	76	Collaboratory - Community Engagement Software	Move to B	11	15	Medium	Hold	Q1 FY22	Provost's Office
	77-78	**Advancement/Development (2)**				**Large**	**Pending**	**TBD**	**Advancement/Development**
Priority A	77	Gift Agreement Workflow	Move to B	16	19	Medium	Hold	Q2 FY22	Advancement/Development
Priority A	78	Replace System for Gift Receipting Process				Large	Pending	TBD	Advancement/Development
	17-20	**ECM (4)**				**Large**	**Pending**	**TBD**	
Priority A	17	ECM - Electronic Document Retention	Move Back to Pre-Approve Status	No Ranking due to COVID-19	---	Large	Hold	TBD	Information Technology Services
Priority A	18	Accounts Payable to Treasury/Cash Management - Foreign Invoices				Small	Hold	Q2 FY22	Accounts Payable
Priority A	19	HSC - Faculty Admin				Medium	Hold	Q2 FY22	Faculty Administration
Priority A	20	DocFinity webforms/workflows that perform transactions in LOCUS				Large	Pending	TBD	Registration & Records

2021 ITESC Schedule

February 25, 2021 - Thursday, 10:00 AM-12:00 PM
- Institutional and Technology Change Management
- Student Experience & External Partner Technology Planning
- Data Integrity

April 22, 2021 - Thursday, 10:00 AM-12:00 PM
- Enterprise Texting
- Major Initiative Next Steps
    - PeopleGrove Mentoring
    - CRM Platform
    - Data Integrity/Cleanup
    - Information Security
- ITESC Governance Review
- Planning for Future Investments

June 17, 2021 - Thursday, 10:00 AM-12:00 PM
- Enterprise Initiative Updates
    - Faculty Admin Re-architecture Strategy (FARS)
    - PeopleGrove Student Mentoring CRM
    - Platform for Schools Advancement CRM
    - Enterprise Texting
- Data Governance & Integrity
- Project Portfolio Prioritization

August 12, 2021 - Thursday, 10:00 AM-12:00 PM
- Start of School Update
- TBD

October 21, 2021 - Thursday, 10:00 AM-12:00 PM
- TBD

December 14, 2021 - Tuesday, 10:00 AM-12:00 PM
- Project Portfolio Prioritization

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