DIGI
Digital Initiatives
Group @ I-TECH

Initial Project Planning

Non-billable to client, up to 8 hours

- The DIGI Co-Faculty Leads will lead all initial planning with the client.
- The purpose of the initial contact is to determine if DIGI can meet project's needs in terms of available resources, skills and expertise, and budget.
- DIGI Leadership will name a Project Lead (PL) to work with the client.
- Some documents the clients should have available at the initial meeting include:
  - Description of the work, including a history of any work previously done on the project, and others involved in the work
  - Category of the work (planning, development, advising, etc.)
  - Expected length of the project, with anticipated start date and completion date
  - How the project will be used, what problem it will be solving
  - Available funding and any funding restrictions (i.e. ability to hire consultants)
  - Platforms in use or targeted software and technologies

Phase 1: Project Initiation

- Clients and DIGI staff define the project using the Project Agreement template provided by DIGI.
- Determine the services to be provided, along with deliverables, milestones, timeline, and budget.
- Clarify stakeholders, participants, roles and responsibilities.
- Identify any assumptions or contingencies.
- The client and PL determine the frequency of communication (weekly, bi-weekly, monthly progress reports only, etc.).
- PL finalizes the agreement with DIGI Leadership review and approval.
- Client signs off on the Project Agreement acknowledging receipt and approves budget in Harvest, the DIGI time tracking and billing software.

Phase 2: Project Implementation

- DIGI is responsible for implementing the project according to the agreement.
- The group submits monthly activity reports to the client.
  - Monthly reports should note any need to revisit the project agreement, based on emerging scope changes. Project agreement is revised and change log is completed.

Phase 3: Project Wrap-Up

- DIGI staff and client meet to debrief on the project, get feedback, and discuss possible future activities. Need for follow-up (3 to 6 months) considered.
- DIGI staff meet internally to debrief the project.