

Binghamton's IR Project Management Database

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Introduction

Why put projects into a database?

- Convenience –
 - End of year reports—memory
- Departmental Efficiency
 - Becoming more proactive/efficient
 - Tying work to goals (office/division/institution)
 - Are your efforts directed toward your priorities?
 - Do more analysis and less reporting
 - Individual workload management

Why put projects into a database?

- Resource justification
 - Show what we worked on
 - Show that it was important
 - Show what we were not able to get done
- Knowing your clients –
 - who are they?
 - what do they want from you?
 - Is it related to goals?

Why put projects into a database?

- Philosophical

- Improvement can only result when you measure performance
- If we wanted others on campus to do this, then we ought to be able to do it ourselves

How did we decide what went into it?

- Started with template provided by Carrol Community College (thanks to Appel and Claggett)
 - Nature of the project
 - Who, What, When
 - Type of project
 - Priority (high, etc.)
 - Current status (pending, complete, etc.)
 - Project leader
 - Dates (request date, target due date)

We added:

- Institutional goals
- Files – “hit by bus” info
- Contributors and Buddies
- Recurring flag for calendar—anticipating work/requests

The Database

- Data Entry Form
- Tables and Queries

What do we do with the information?

- Departmental Efficiency
 - Reports for Workload Management
 - “To Do” list
 - Contributor list
 - Are we working on priorities
 - Counts by goal
 - Status by goal
 - What’s getting done and what isn’t?
 - Lots of projects that are not related to goals

What do we do with the information?

- Departmental Efficiency (continued)
 - Planning Departmental Activity
 - Recurring Report
 - Used to create office calendar for the month ahead
 - Counting and listing of projects by type
 - What type of work comes to the office?
 - How do you and your staff spend most of your time?

What do we do with the information?

- Reports for resource justification
 - List of completed projects
 - Used to identify major accomplishments for the year
 - Status by goal
 - The projects we completed advanced the University towards these goals
 - Requestor group (VP area) by goal
 - Here's how we helped you and your staff

What do we do with the information?

- Knowing our customers
 - Requestor group by goal
 - Who are they?
 - Was what they wanted goal related?
 - Counting and Listing of Projects by type
 - For what does your institution rely on your office
 - Gives a glimpse into how your campus perceives you
 - What are the services that supply

Issues you will encounter

- What is a project?
- Lots of information
 - How will you act on it?
 - Internally
 - Externally
 - Be realistic about what you will do
 - It is (or can be) a lot of work
- Cleaning / maintenance
 - Centralized or decentralized data entry?

Tips

- Standardize inputs
 - Requestor names
 - Requestor Groups
 - Project Types
 - Goals
 - Status
 - Priorities

Contact Info:

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Director

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Office of Institutional Research Project Management System

Date of Request

11/14/2001

Requestor

Patricia Reynolds

Requestor Group

VP External Affairs

VP Area

VP External Affairs

Project Type

Analysis

Project Number

62

Project Name

Predictive Model of Alumni Giving

Project Description

Analyze historical data on alumni gifts to isolate important predictors of giving. Alumni office will use results to target efforts to provide greatest return on investment.

Priority

High

Target Date

4/1/2002

Date Begun

2/1/2002

BU Goal 1

Increase Gifts to BU

BU Goal 2

Recurring?

Lead Analyst

Jerret

Buddy

Pete

Contributor 1

Contributor 2

Contributor 3

Status

Complete

Date Completed

7/19/2002

Project Files

S:\LeMay\Alumni Giving
S:\LeMay\Alumni Giving\Alumni Giving.pdf

Contributor Listing Monday, January 05, 2004

<i>Contrib. #1</i>	<i># 2</i>	<i># 3</i>	<i>Lead</i>	<i>Project Name</i>	<i>#</i>	<i>Requestor</i>
Agatha			Eric	Multivariate Yield Analysis	41	Sandra Starke
Agatha	Eric		Carol	2004 National College Guide	666	Education Network
Agatha	Eric	Dan	Carol	Barron's Profile of American Colleges	648	Darrell Buono
Carol			Eric	Enrollment Surveys - Fall 2003	718	John Porter
Carol			Eric	Admissions & Academic Prep for First Time Stude	751	John Porter
Carol	Human Reso		Dan	03-04 Mid-Level Professional & Adm. Salary Surv	650	Ray Sizemore, CUP
Carol	Other Office		Dan	National Study of Faculty	682	Margaret Cahalan
Committee			Michelle	Space Requests	58	Various
Dan			Pete	Moving the Drop Deadline	740	Mary Ann Swain
Dan			Pete	Web-based Faculty Activity Database	35	Michael McGoff
Dan			Michelle	Look into Space Management Systems	658	Peter Partell
Dan	Eric	Agatha	Carol	Common Data Set 2003-04	697	Institutional Researc
Dan	Other Office		Michelle	Facilities & Administration	395	Paul Parker
Dan	Students		Eric	Fall 2001 Competitor Analysis	45	Sandra Starke
Eric			Michael	Institutional Activity Survey	654	John Porter
Eric	Jerret		Lynn	Enrollment Team - Entire Project - EPM	377	Peter Partell

Count of Projects by BU Goal 1

<i><u>BU Goal 1</u></i>	<i><u>Count</u></i>
Campus Community	6
Campus Planning	167
Effect of BU on Local Commun	8
Enrollment Growth	150
Increase Gifts to BU	22
Increase Research Expenditure	17
None	292
Quality Programs	43
Unclear	82

Status by BU Goal 1

<i>BU Goal 1</i>	<i>Total</i>	<i>Complete</i>	<i>Denied</i>	<i>In Progress</i>	<i>Pending</i>	<i>Suspended</i>
Campus Community	6	5		1		
Campus Planning	167	101	1	28	19	18
Effect of BU on Local Community	8	7			1	
Enrollment Growth	150	116	1	19	10	4
Increase Gifts to BU	22	20			2	
Increase Research Expenditures	17	15		2		
None	292	243	6	13	20	10
Quality Programs	43	33		1	5	4
Unclear	82	74	2	1	1	4

Recurring Projects by Month

January

Project Name Peterson's Undergraduate Financial Aid Survey

Project Description Common Data Set plus many additional questions on financial aid awards, etc.

Requestor Dan Margolin

Requestor Group External ***VP Area*** External

Lead Analyst Agatha

Project Files

Project Name College Board 2003-04 Annual Survey

Project Description Common Data Set plus additional questions on admissions, programs, majors, etc.

Requestor College Board

Requestor Group External ***VP Area*** External

Lead Analyst Carol

Project Files

Project Name Chronicle Guidance Majors Survey

Project Description List of all Bachelors, Masters, Doctoral degree programs

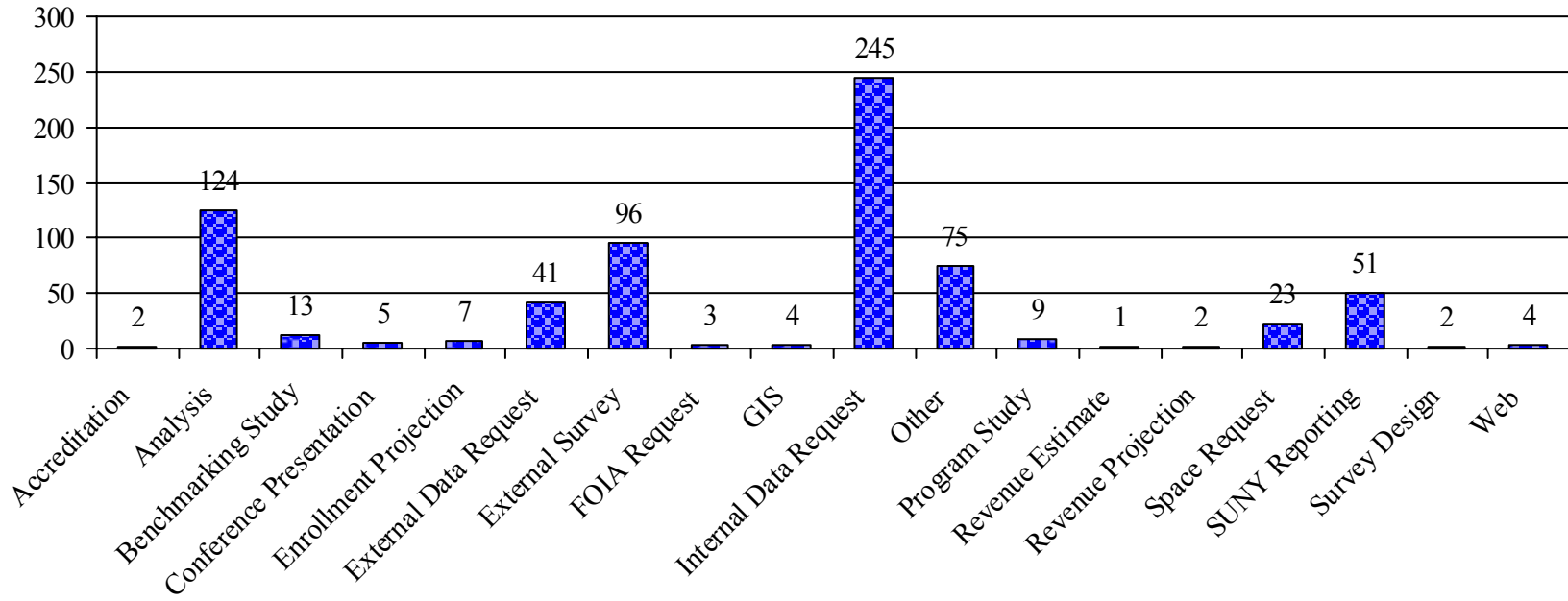
Requestor Chronicle Guidance

Requestor Group External ***VP Area*** External

Lead Analyst Carol

Project Files

OIR Project Workload
All Projects



Completed Projects by BU Goal

July 1, 2002 through June 30, 2003

Goal *Campus Planning*

Project Name Cost/Benefit -- Physical Education **Requestor** Mary Ann Swain

Description Provide revenue compared to expenditures for Physical Education.

Date Completed 7/3/2002 **Target Date** 7/3/2002 **Priority** High

Project Name Health Insurance for Students **Requestor** Dennis Chavez

Description University requiring students to buy health insurance or supply proof. Needs a list of students who have been offered aid but have no health insurance waivers. Need to make contingency funds available by

Date Completed 7/18/2002 **Target Date** 7/18/2002 **Priority**

Project Name Gather data for President's retreat **Requestor** Lois DeFleur

Description Gather various information for President's retreat. Asked for all OIR input.

Date Completed 7/31/2002 **Target Date** 7/31/2002 **Priority** ASAP - Top Priorit

Project Name Housing Scenarios **Requestor** Anna Cornell

Description Generate housing scenarios to guide decisions on Dickinson and Newing renovation projects.

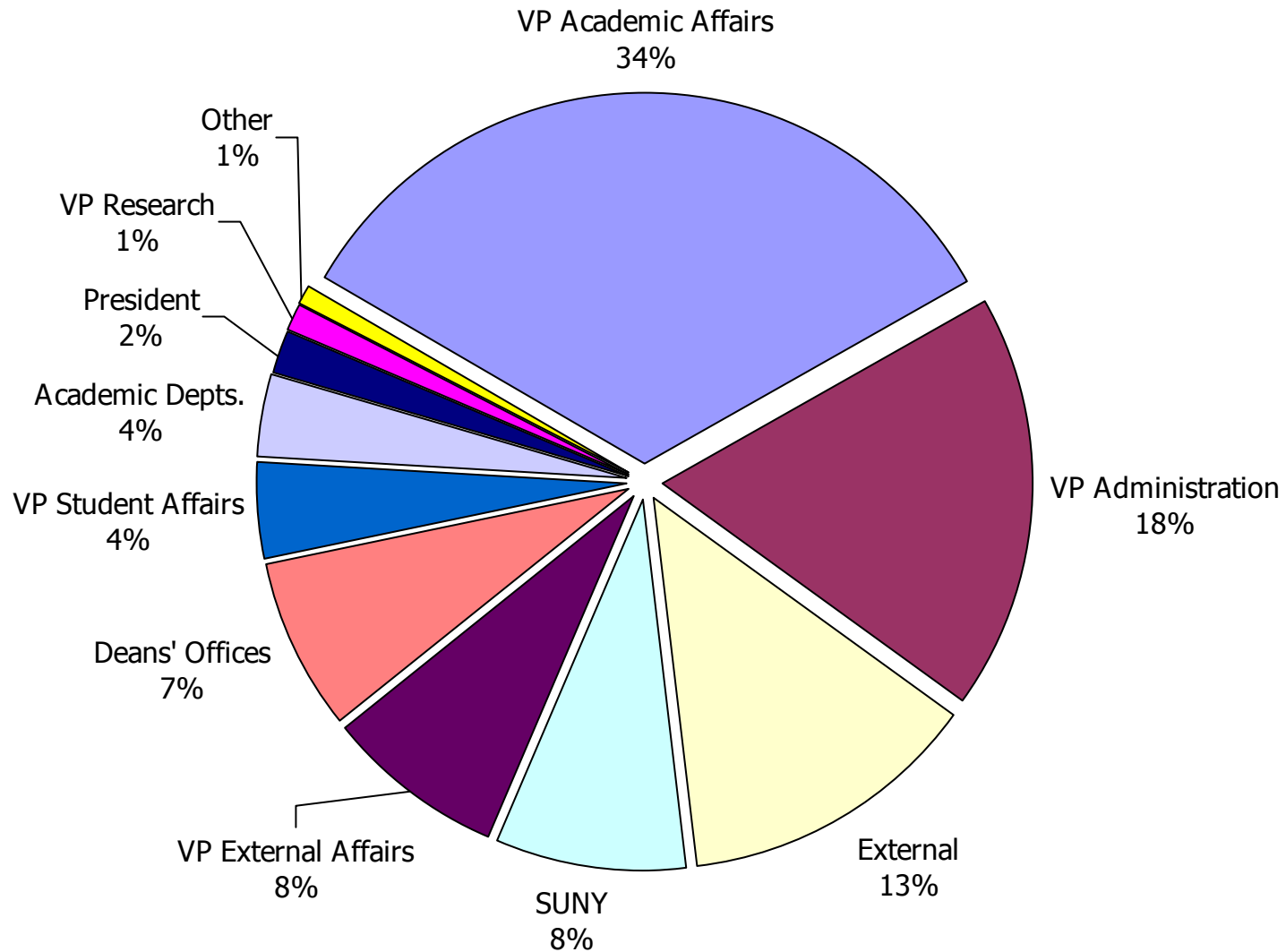
Date Completed 8/1/2002 **Target Date** 8/1/2002 **Priority** ASAP - Top Priorit

Project Name Lost FTE **Requestor** Jim Vanvoorst

Description Examine FTE and dollars lost from registration after freeze, plus anticipate FTE/\$ lost as a result of moving freeze date to November 1. Also look at whether late registrants are funded grad students to make inform decisions about creating incentives for departments to get students registered sooner.

Date Completed 8/10/2002 **Target Date** 8/10/2002 **Priority** High

Projects Requested of OIR by Requestor Group



Total Number of Projects: 702

Note: OIR began tracking projects in March of 2002

Thursday, January 08, 2004

Requestor Group by Goal 1

<i>Requestor Group</i>	<i>Total</i>	<i>Campus Community</i>	<i>Campus Planning</i>	<i>Effect of BU on Local Community</i>	<i>Enrollment Growth</i>	<i>Increase Gifts to BU</i>	<i>Increase Research Expenditures</i>	<i>None</i>	<i>Quality Programs</i>	<i>Unclear</i>
Academic Advising	2							2		
Academic Depts.	28		2				2	14	2	8
Admissions	28	1			16	1		6		4
Affirmative Action	2							2		
Alumni & Parent Rel	6					3		2		1
Anderson Center	1							1		
Association of Institu	4							4		
Athletics	1								1	
Auxiliary Services	2		1					1		
BU Foundation	6				1	2		3		
Business Office	12		7					3		2
Career Development	3					1		1		1
Center for Learning a	1								1	
Center for Quality	4	1						3		