

From Request Intake to Resource Allocation: Simulation of Michigan's "Front Door" and Cycle Planning Processes

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What is Front Door and Cycle Planning Process?

Front Door is an *easy Intake Process* designed for library divisions, staff, and key partners to request resources and consultation

Cycle Planning Process is the process of reviewing, prioritizing, and allocating resources to the work while keeping the process transparent to provide a pathway to solutions fulfilling the needs of our users. It aims to support Innovation, improved service with greater efficiency and increased access



Higher Purpose

Library Information Technology's role is to **act as a partner** to all library divisions to provide consultation, design and development resources to meet technology needs. The Front Door process provides a **simple intake process** for all library staff. The Cycle Planning process provides the **transparency** of how we **prioritize, and schedule** the work in LIT while keeping stakeholders **engaged in the process, outcomes, and success.**

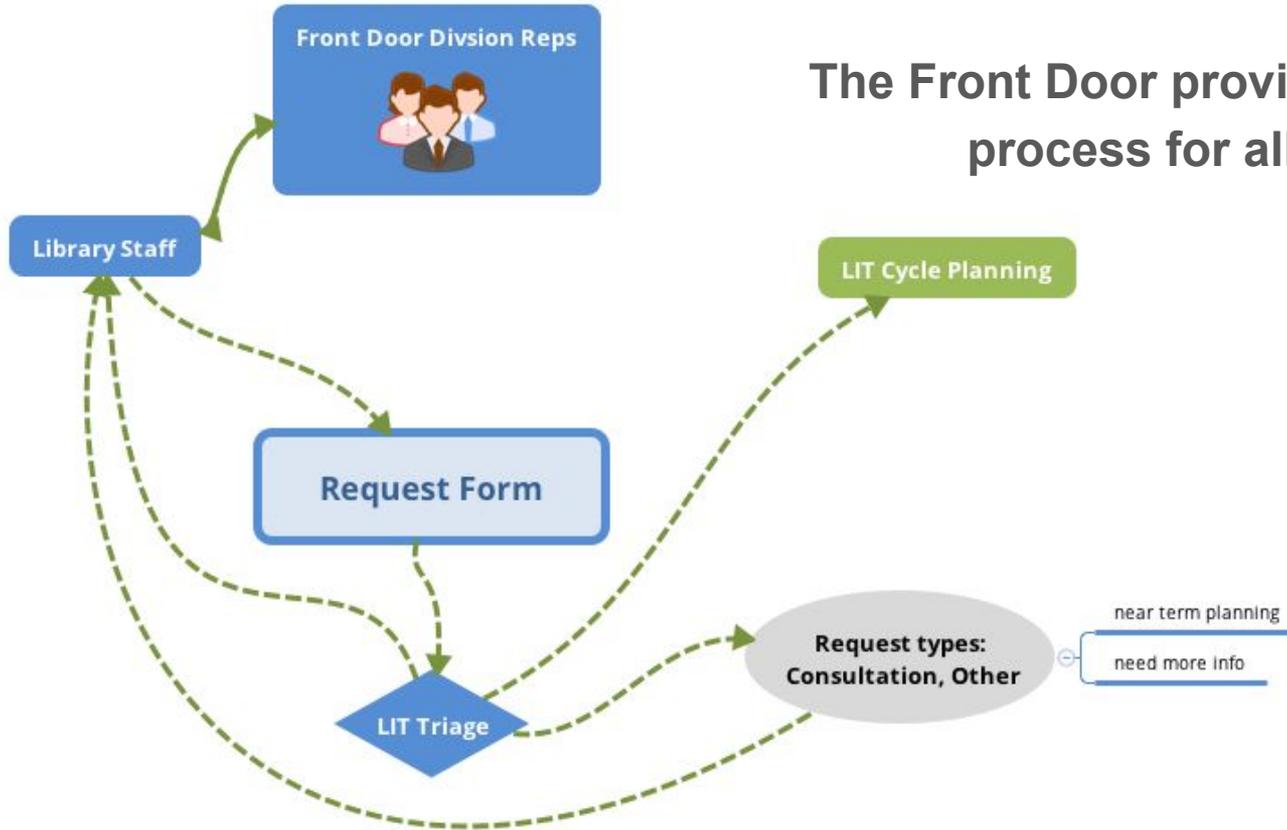
The philosophy behind a structured process is to

- provide all divisions with the opportunity to bring their ideas forward
- Library staff collaborate with LIT in prioritizing the work based on the impact it will have on the library and broader community.

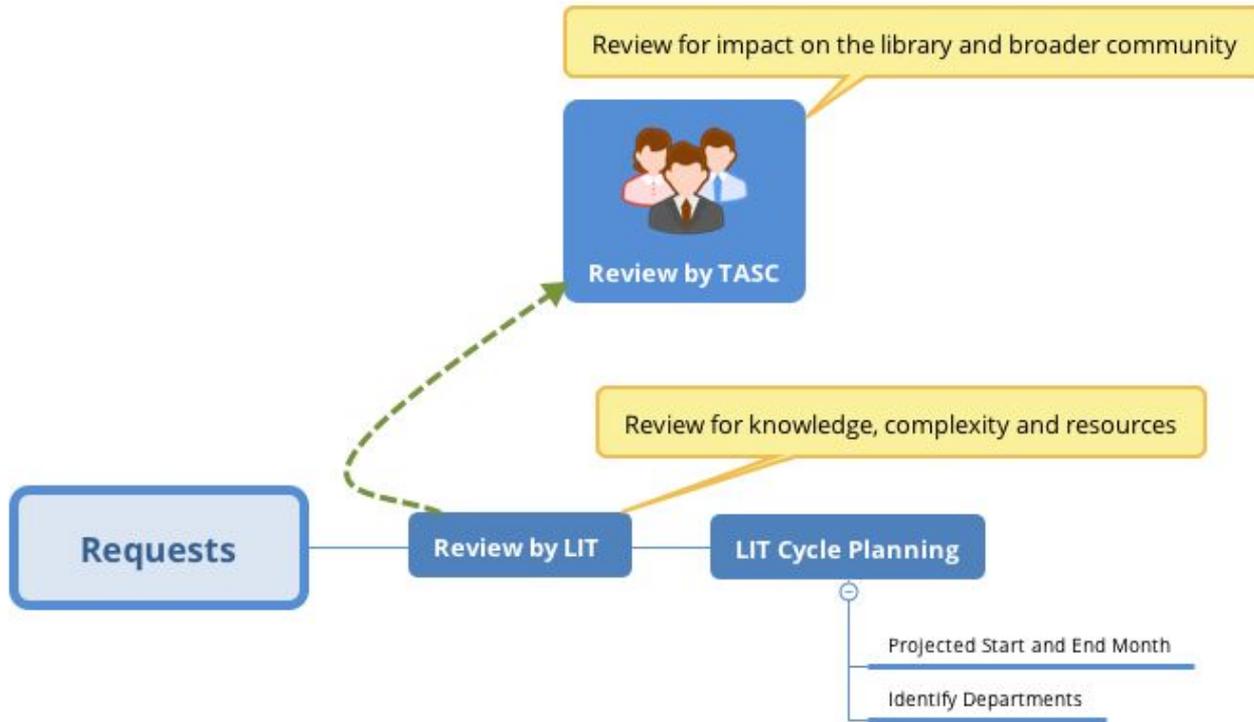


Front Door: Request Intake Process

The Front Door provides a simple intake process for all library staff



LIT Cycle Planning Process



Provides the transparency of how we prioritize, and schedule the work while keeping stakeholders engaged in planning process, outcomes, and success

Request Intake Forms



Welcome to LIT Front Door Request Intake Form!

Please fill out the form, your request will be reviewed by LIT and you will be notified within 3-5 days with any questions or feedback. Please contact your [division representative](#) for help with crafting the proposal. If you have any question about the process, please contact LIT Front Door coordinator, Nabeela Jaffer (njaffer@umich.edu).

Request Type:

Consultation

Service Improvement

New Service

Other



STRATEGIC PROJECT SORTING

1 HAVE UP PRIOR LISTS OF **WORKING REQUESTS**

KEY POINT
THE SCOPES FOR THIS WORKSHOPS ARE "FOR THE NEXT YEAR"

(GET CURRENTLY ACTIVE REQUESTS)
→ AT THE DIVISION LEVEL
→ AT THE DEPARTMENT LEVEL

ANY WORKING REQUESTS THAT IS NOT YET IN PROGRESS IS SUBMITTED FOR YOUR WORKSHOP. SUBMITTING FROM THE DIVISION LEVEL WILL BE BETTER. THE DIVISION REQUESTS ARE SUBMITTED FIRST (AND THEN DEPT. REQUESTS).

2 MAKE THESE INTO CARD CARDS, ONE REQUEST PER CARD, COLOR CODED FOR EACH DEPT.

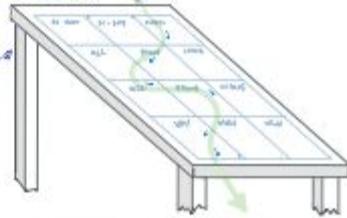
ENHANCED BUSINESS IDENTIFIERS
→ Includes ID #S for identification additional project related requirements

Number assigned (and color) per request!
Project description (as a sentence) - use a separate page when!



- SUPPLIES ---
- Ruler or 24" object
 - Colored paper
 - Marker/Sharpie/White
 - Large card stock
 - Post-it notes (colored paper)

3 COVER A LONG TABLE WITH EASEL SHEETS OF PAPER AND DIVIDE INTO THREE SIDE-BY-SIDE COLUMNS. THE CARDS WILL BE PLACED ON THE TABLE AT THE TOP AND FLOW TOWARDS THE BOTTOM THROUGH THE COURSE OF THE WORKSHOP



4 ASK THE FOLLOWING QUESTIONS OF THE PARTICIPANTS, AND HAVE THEM MOVE EACH CARD INTO THE APPROPRIATE COLUMN. (SOME CARDS WILL BE SORT-OUT FIRST WHICH TO PUT THEM, OTHERS MAY NEED A PAIR amount of GROUP DISCUSSION!)

QUESTION #1:
HOW IS THIS WORKING FOR YOU?

IT MAY	IT'S ONE THING, BUT	MULTIPLE ASKS
IT MAY	IT'S ONE THING, BUT	MULTIPLE ASKS

TIP:
THE PROJECTS THAT REQUIRE MULTIPLE ASKS ARE THE MOST CHALLENGING. YOU CAN BE CREATIVE, APPROACH WITH FLEXIBILITY, YOU WILL NEED TO BE VERY CAREFUL!

- 1 SORT THE REQUEST CARDS INTO THE RIGHT COLUMNS
- 2 TAKE A PROJECT & CHECK EACH AND EVERY THING
- 3 PICK UP THE CARD FROM "MULTIPLE ASKS" AND MOVE TO THE NEXT COLUMNS

QUESTION #2:
DO WE HAVE THE RESOURCES NEEDED FOR THIS PROJECT?

ALL	SOME	NOPE
ALL	SOME	NOPE

TIP:
DO WE HAVE THE RESOURCES NEEDED FOR THIS PROJECT? (DO WE HAVE THE PEOPLE, THE EQUIPMENT, THE BUDGET, THE SPACE, THE TIME?)

- 1 SORT THE REQUEST CARDS INTO THE RIGHT COLUMNS
- 2 TAKE A PROJECT & CHECK EACH AND EVERY THING
- 3 PICK UP THE CARD FROM "ALL" AND MOVE TO THE NEXT COLUMNS

QUESTION #3:
DO WE HAVE THE POTENTIAL BENEFITS NEEDED FOR THIS PROJECT?

ALL	SOME	NOPE
ALL	SOME	NOPE

TIP:
DO WE HAVE THE POTENTIAL BENEFITS NEEDED FOR THIS PROJECT? (DO WE HAVE THE BENEFITS, THE EQUIPMENT, THE BUDGET, THE SPACE, THE TIME?)

- 1 SORT THE REQUEST CARDS INTO THE RIGHT COLUMNS
- 2 TAKE A PROJECT & CHECK EACH AND EVERY THING
- 3 PICK UP THE CARD FROM "ALL" AND MOVE TO THE NEXT COLUMNS

QUESTION #4:
WHAT IS OUR OUTLOOK FOR EACH PROJECT?

YUP	MEH	UGH
YUP	MEH	UGH

TIP:
IF A PROJECT IS NOT YUP - MEH - UGH, THEN IT'S NOT WORTH THE INVESTMENT. YOU WANT THE OUTLOOK TO BE POSITIVE. IF NOT, YOU MAY WANT TO RE-EVALUATE THE PROJECT.

- 1 SORT THE REQUEST CARDS INTO THE RIGHT COLUMNS
- 2 TAKE A PROJECT & CHECK EACH AND EVERY THING
- 3 PICK UP THE CARD FROM "YUP" AND MOVE TO THE NEXT COLUMNS

! MOVE! ! MOVE!
THAT'S HOW YOU MOVE CARDS. YOU WANT TO BE IN THE RIGHT PLACE!



Cost and Complexity Review by LIT

Investigations

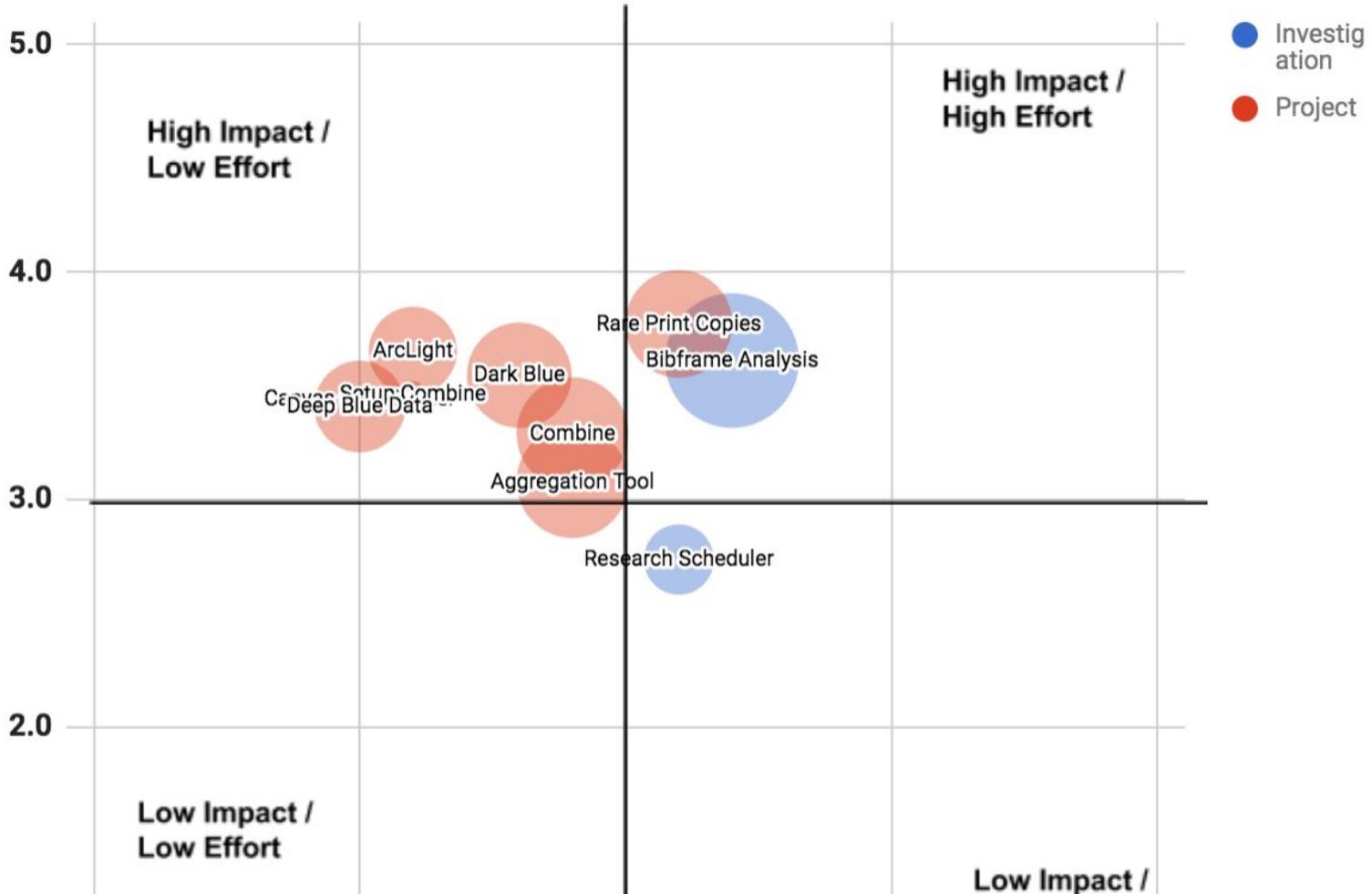
Complexity Factors							Cost Factors						
Request Short Name	Domain	Investigation Scope	Technical Knowledge/ Expertise	Team Scope			Total Complexity Score	Cost	Potential Divergence from Platform			Total Cost Score	Weighted Effort Score
Research Scheduler	LIT+1(L&T)	medium-high	low-medium	medium-high			3.2	low	low-medium			1.5	2.7
Canvas PageBuilder	LIT+1(L&T)	low-medium	low-medium	low-medium			2.0	low	low			1	1.7
Bibframe Analysis	LIT+1(COL)	medium-high	medium-high	low-medium			3.4	medium-high	medium-high			4	3.6
IIIF for DPLA	LIT ONLY	low-medium	low-medium	medium-high			2.6	low	low			1	2.1
Trello API	LT ONLY	low-medium	medium-high	low			2.5	low	low			1	2.1
LIT Doc Standards	LIT ONLY	medium-high	low	low			1.9	low	low			1	1.6
Request Short Name		Infrastructure	Application	Front End Development	Data & Content	Scope of Team	Total Complexity Score	Staff Resources	Divergence from Platform	Money	Operational	Total Cost Score	
Rare Print Copies	LIT+1(COL)	low-medium	medium-high	medium-high	low	high	3.2	medium-high	medium-high	low	low-medium	2.7	3.1
Dark Blue	Multiple divisions	low	low	low-medium	medium-high	high	2.6	medium-high	low	low	medium-high	2.6	2.6
Combine	Multiple divisions	low	medium-high	medium-high	low	medium-high	2.8	medium-high	medium-high	low	low	2.9	2.8
Setup Combine	Multiple divisions	medium-high	medium-high	low	low	low	2.2	low-medium	medium-high	low-medium	low-medium	1	1.8
Deep Blue Data	Multiple divisions	low	low-medium	low-medium	low	medium-high	2.0	high	low	low	low-medium	2.1	2.0
ArcLight	Multiple divisions	low	low-medium	low-medium	low	high	2.2	medium-high	low	low	low	2	2.1
Aggregation Tool		low	medium-high	medium-high	low	medium-high		medium-high	medium-high	low	low	2.9	2.8

Projects

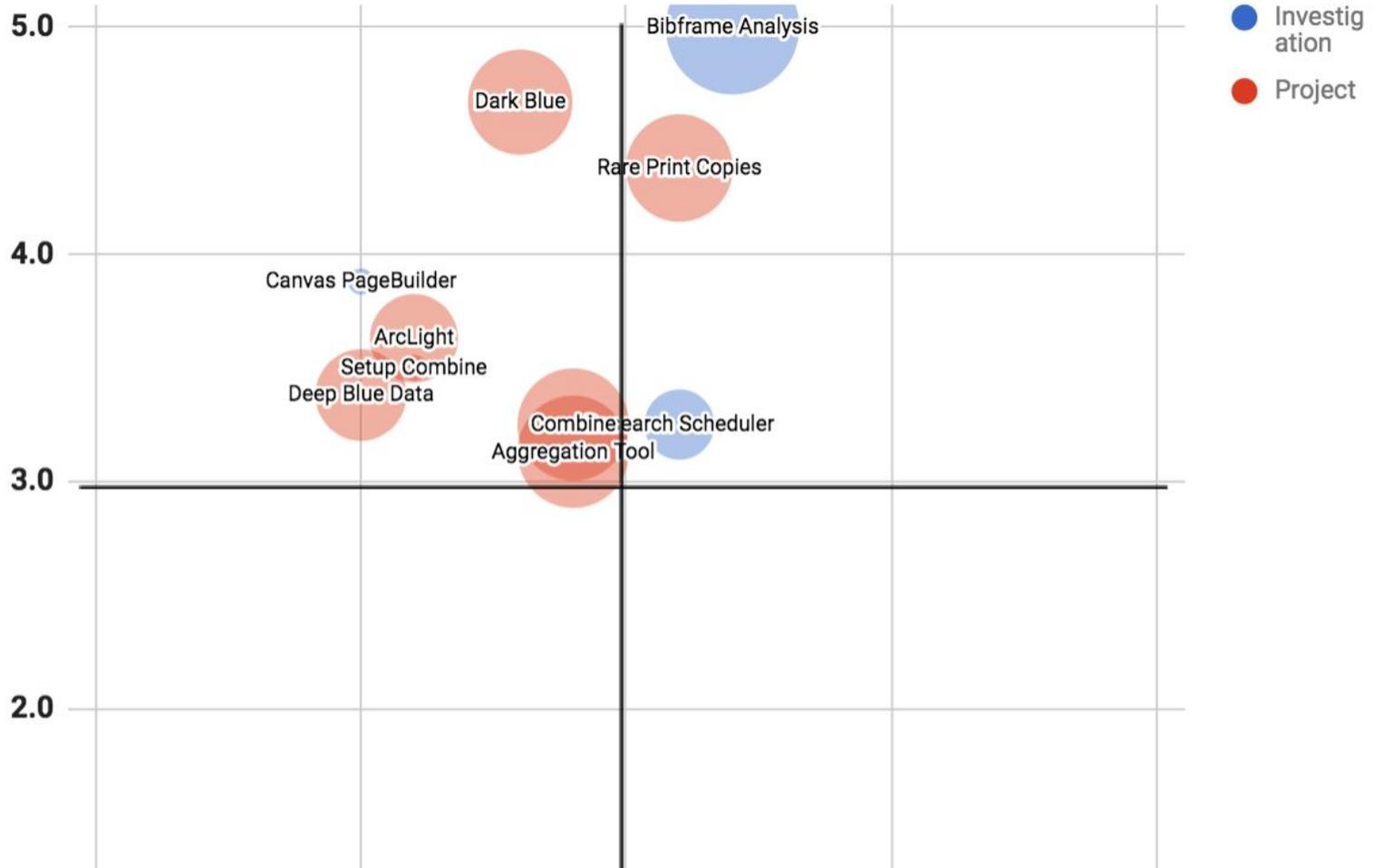
Impact Review by Broader Library (TASC)

Request Short Name	Domain	BENEFIT	ACCOMPLISH	AT STAKE	PRESSURES	CHANGE	IMPACT SCORE	GUT CHECK
Research Scheduler	LIT+1(L&T)	1.9	2.6	1.4	1.4	4.3	2.7	3
Canvas PageBuilder	LIT+1(L&T)	2.3	3.1	2.6	1.7	3.8	3.4	4
Bibframe Analysis	LIT+1(COL)	1.2	2.8	3.3	3.2	5.0	3.6	5
Rare Print Copies	LIT+1(COL)	2.2	3.6	2.5	2.7	3.9	3.8	4
Dark Blue	Multiple divisions	2.0	3.0	2.7	2.9	3.9	3.5	5
Combine	Multiple divisions	1.8	3.2	1.7	2.7	4.3	3.3	3
Setup Combine	Multiple divisions	1.8	2.9	2.4	3.1	4.3	3.5	4
Deep Blue Data	Multiple divisions	2.0	3.6	1.7	2.3	4.3	3.4	3
ArcLight	Multiple divisions	2.2	3.7	1.8	2.7	4.5	3.7	4
Aggregation Tool	Multiple divisions	1.7	2.5	1.8	3.1	4.0	3.1	3

FY19:2 - Calculated Score



FY19:2 - Gut Check Score



Spreadsheet works but how
about a web app!!



All Fields ▾

Search...

Search 🔍

Activity Type ▾

Project	61
Investigation	18
TASC Investigation	3

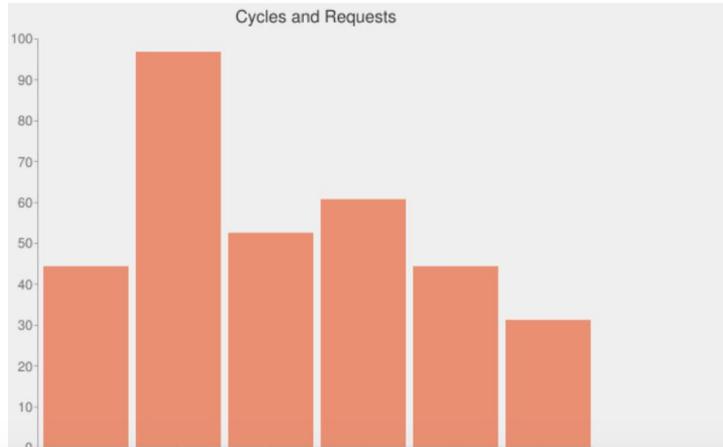
Request Cycle >

Start Cycle >

Card Status >

LIT Cycle Management Tool: Track work from intake to close
Take - Rate - Assess - Communicate - Close

Stats: [New Requests](#)



Expectation Management

Roles and Responsibilities



Start of the cycle

Tasks	FD Coordinator	TASC Coordinator	LIT Head	Project Lead	Service Lead	LIT Teams
Inform stakeholders about the cycle planning decisions, such as start month and team members	A		C	I		I
Communicate with stakeholder if the project does not start as planned	A		C	R		I
Create charge for investigation teams; create timeline and tasks for the team		A		R	R	C



FOUR MONTH CYCLE STARTS

LIT works on the projects in collaboration
with the stakeholders



Project Update Reviews

- LIT Team leads updates the project cards monthly
- LIT Heads reviews the progress with the Front Door Manager
- LIT Coordinating Group reviews the projects at mid of the cycle and again at the end of the cycle
- TASC reviews the investigation requests throughout the cycle
- Assessment survey is sent to primary stakeholders after each cycle. The data is used to refine and improve the process.



During the Cycle

Tasks	FD Coordinator	TASC Coordinator	LIT Head	Project Lead	TASC Liaison	LIT Teams
Inform TASC members about any comments related to their questions, posted on the project cards during the cycle	I	A	I	I		I
Update project cards monthly	I		I	A		I
Keep stakeholders updated throughout the cycle			C	A		I
Serve as a communication channel between TASC and the co-chairs of the investigation team		A			R	
Provide a quick update about the work of team and/or bring questions from the team to TASC during monthly meetings		I		R	A	

Cycle Reviews

Short Name	Work Status projected end of cycle	Rationale	Departments
IIIF for DPLA	Not Started	Lack of Resources	DLA
Trello API	Finished	As-Expected	DLA, D&D, A&E
LIT Doc Standards	In-progress	As-Expected	DLA, D&D, A&E, DCC, AIM
Rare Print Copies	Not Started	Lack of Resources	A&E
Dark Blue	In-progress	Lack of Resources	A&E
Combine UI	Other	As-Expected	D&D, DCC
Setup Combine	Not Started	Lack of Resources	A&E, DCC
Deep Blue Data	Finished	As-Expected	DLA
ArcLight	Not Started	Lack of Resources	DLA, DCC



End of the Cycle

Tasks	FD Coordinator	TASC Coordinator	LIT Head	Project Lead	Service Lead	LIT Teams
Inform stakeholders (is the work done or carried over, not progressing as expected)			C	A		I
Send Survey to stakeholders (if the work is done or end of the first cycle)	A		I	I		
Create a final report with recommendations and submit to TASC		I	I	R	A	C
Share End of Cycle Review with TASC	I	A	I			



Assessments

Process and Stakeholder Satisfaction



Assessment Touchpoint

Each cycle, an assessment form is sent to:

- **New requests:** Helps improve the process and the intake form
- **Work Done:** Helps improve the stakeholder communication and engagement
- **Continuing Work:** Helps with making tweaks to the communication and engagement with the stakeholders



Thank you!

Questions?

Email: njaffer@umich.edu

Acknowledgments

**LIT Coordinating Group, LIT Department Heads, TASC, and
Maurice York, AUL Library IT
University of Michigan**

