



THE UNIVERSITY
of EDINBURGH

Applications Directorate Information Services

Project Planning Guide 2023/24 – 2027/28



Introduction

OVERVIEW

Each year the Applications Directorate delivers more than 75 projects, supporting business and IT change across the University. To help us to understand demand for our resources, and to plan and prioritise projects, we undertake an annual planning process using a 5 year horizon.

CORE FUNDED

We allocate £1.4M each year to projects that are focused on supporting central IT systems. We ask our partners to work with us to develop proposals to bid for this funding. We describe this as **core funded** work. We only prioritise projects which start in the first year of the 5 year plan. If a proposal requires significant investment, we help our partners to bid for funding as core funding is most often allocated to smaller initiatives costed at less than £100K.

We also allocate more than £150K to support the Colleges, the use of this fund is prioritised by the Heads of College IT, and we contribute £325K to the Student Systems Partnership with the University Secretary's Group.

SPONSOR FUNDED

In addition to our core funded work, we undertake a significant amount of funded work – we describe this as **sponsor funded**. We support our partners in bidding for funds through local or University planning processes, working with them to develop high quality proposals that make the case for change.



Core Funded Plan

Our core funded plan is divided into 3 sections:

SECTION 1: REPEATING PROJECTS

We have a number of projects which take place annually or bi-annually. Proposals have already been completed and agreed as part of earlier consultations, so we can publish this section of the plan immediately.

SECTION 2: CONTINUING PROJECTS

This section of the plan details projects planned to take place over multiple years, together with 2022/23 projects which are expected to continue into 2023/24. All of the projects have been agreed as part of earlier consultations, and their priority will be reconfirmed.

SECTION 3: NEW PROJECTS

New projects include projects contained within later years of the 2022/23 5 year plan as they have not yet been prioritised. They also include repeating projects which have changed frequency or size. This section of the plan is the focus of our consultation process.

1 REPEATING PROJECTS

Standard annual or bi-annual projects which have been reviewed and identified as a priority as part of previous consultations

2 CONTINUING PROJECTS

In progress and multi-year projects which have been reviewed and prioritised in a previous consultation – continuing need will be confirmed

3 NEW PROJECTS

New projects or repeating projects where the frequency or size has changed – review required as part of standard consultation process



Core Funded Plan Consultation

PURPOSE

Demand for our core funded resources for **New Projects** consistently exceeds our core funded capacity. To help us to produce a plan which reflects the highest priority projects, we undertake a consultation as part of planning.

PRIORITISATION

Each proposal is assigned to one of the themes we have agreed as part of previous consultations. Together with colleagues we have prioritised Legal, Start of Term, and Information Security, with the other themes listed in alphabetical order. Prioritisation discussions focus on the level of risk to University services.

CONTRIBUTORS

As part of the consultation process we meet with representatives from all of our partners who have contributed proposals. We also review the plan with Heads of College IT and with Strategic Change.

Themes

LEGAL

Comply with legislation

START OF TERM

Support critical start of term processes

INFORMATION SECURITY

Critical updates to software/ hardware

COLDFUSION

Resolve technical debt for aging technology

PROCESS

Improve or update existing processes

PROCUREMENT

Procure or re-procure systems/services

REF

Support the next REF exercise



Sponsor Funded Plan

DEMAND

We undertake a wide range of sponsor funded work each year. This includes projects that did not secure core funding so have been locally funded instead, projects which require significant investment, and projects within change programmes such as the Digital Estate. We can predict demand based on previous years and therefore already have staff in place, reducing the risk of recruitment delays and helping us to build higher education knowledge and experience within our teams.

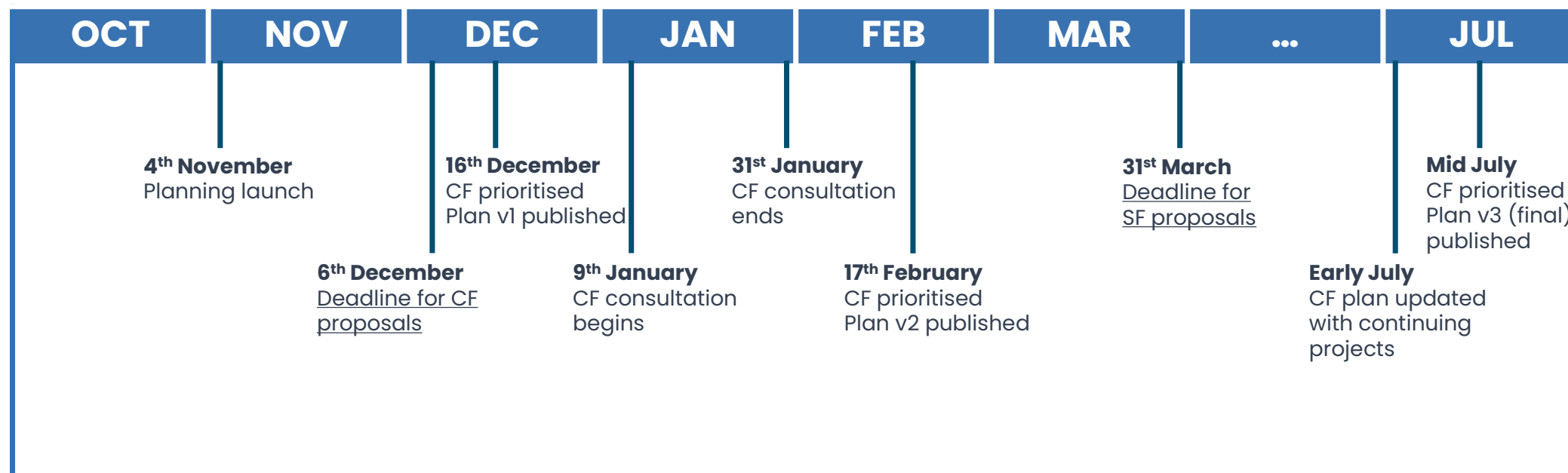
TIMELINE

Our deadline for sponsor funded proposals is the 31st March 2023, following on from University planning discussions. We set this deadline to help us to understand potential demand for the upcoming year and to plan our resource allocation. We do also accept sponsor funded proposals during the year, there is a risk that we do not have resources immediately available depending on demand identified during planning discussions - we typically use a 3 month planning window for resource allocation.

CONFIRMATION OF FUNDING

We appreciate that you will not necessarily know if you have successfully secured funding when you submit sponsor funded proposals to our planning process. We can note that at the point of submission and follow up with you later.

Timeline



NOTES

1. CF = Core Funded and SF = Sponsor Funded
2. The first prioritised version of the Core Funded Plan is now being published in December so that our partners have a reasonable indication if a proposal has been successful prior to University planning discussions – if they have been unsuccessful and decide to bid for funding, the proposal can resubmitted as Sponsor Funded

How we can help



Developing proposals and planning bids



Assessing if your needs can be met by existing services



Identifying and estimating costs and benefits of all types



Leveraging our cross campus relationships



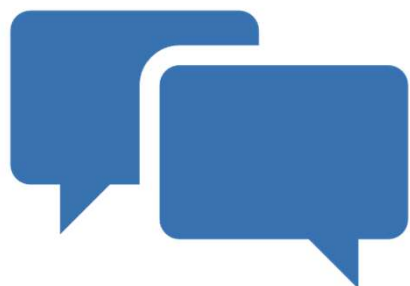
Advising you on new or emerging technology



Identifying connections with other change programmes*

* e.g. Digital Estate, Digital Strategy, Strategic Change

Getting started



If you would like to work with us to develop a proposal or if you have any questions about the process, please get in touch!

A list of contacts is provided on the next couple of slides.



Contacts (1 of 2)

5 Year Planning		Rhian Davies		
Portfolio	Prog. Name	Programme Full Name	Programme Owner	Programme Mgr
Applications Directorate Portfolio Owner: Stefan Kaempf Portfolio Manager: Andrew Stewart	COM	Communication	Alex Carter	Colin O'Sullivan
	INF	IS Applications Infrastructure	Suran Perera	Andrew Stewart
	APD	Apps Portfolio Projects	Stefan Kaempf	Andrew Stewart
Corporate Services Group Portfolio Owner: Ashley Shannon Portfolio Manager: Andrew Stewart	ACE	Accommodation, Catering and Events	Andrew Glass	Andrew Stewart
	FIN	Finance	Rachael Robertson	Ben Armstrong
	HAS	Health and Safety	Candice Schmid	Andrew Stewart
	HRS	Human Resources	Phil Spencer	Susan Ridder-Patrick
	CSGOTH	CSG Portfolio Projects	Ashley Shannon	Ben Armstrong
Estates Systems Partnership Portfolio Owner: Zoe Stephens Portfolio Manager: Mark Ritchie	EOO	Business Operations Optimisation	Zoe Stephens	Marjory Howarth
	EST	Estates Portfolio Projects	Zoe Stephens	Mark Ritchie



Contacts (2 of 2)

Portfolio	Prog. Name	Programme Full Name	Programme Owner	Programme Mgr
Information Services Group Portfolio Owner: Gavin McLachlan Portfolio Manager: Adam Wadee	COLL	Collections 2025	Hannah Mateer	Karen Stirling
	LUC	Library & University Collections	Rebecca Hirsch	Karen Stirling
	RIS	Research Information Systems	Dominic Tate	Karen Stirling
	SMI	IT Service Management	Alex Carter	Colin Watt
	TEL	Technology Enhanced Learning	Karen Howie	Colin Watt
	WPS	Web and Portal Services	Stratos Filalithis	Tim Gray
	ISGOTH	ISG Portfolio Projects	Stefan Kaempf	Adam Wadee
University Secretary's Group Portfolio Owner: Jim McGeorge Portfolio Manager: Muriel Mewissen	SSP	Student Systems partnership	Brandi Headon	Franck Bergeret
	STU	Student Services	Jim McGeorge	Susan Ridder-Patrick
	TTU	Timetabling	Scott Rosie	Jamie Thin
	USGOTH	USG Portfolio Projects	Jim McGeorge	Muriel Mewissen
Digital Transformation Portfolio Owner: Gavin McLachlan Portfolio Manager: Stephen Roy	DTS	Digital Strategy	Gavin McLachlan	Stephen Roy
	DLIB	Digital Library	Rebecca Hirsch	Karen Stirling