All OE Initiative Teams are scheduled to complete their analysis and reports by March 31, 2011. The reports will include a business case summarizing the findings and recommendations as well as a resource request for each project the initiative team is proposing in order to achieve their objectives. There can be multiple projects for each initiative. Following is the process that will be followed to review, evaluate, and decide on the proposals.

**Preparation of OE Initiative Design Reports**
- The OE Program Office will:
  - Verify the required materials are included in all submissions
  - Collaborate with Design Teams to get to a set of reports that both can support in moving forward in the process
  - Coach Design Team on preparations for executive summaries and presentations
  - Provide financial analysis on initiative proposals and for the OE program in general

**OE Program Office Analysis of Initiative Design Reports**
- Review Business Cases and Resource Requests
  - with Initiative Design Team
  - with subject matter experts across the campus
- Analyze proposals
  - through the narrow lens of proposed project
  - through the wider lens of the OE program and the campus overall
- Prepare and provide a Statement of Analysis
  - for the Coordinating Committee
  - for the Executive Committee

**Recommendation by the OE Coordinating Committee**
- Meeting #1 – Initiative Presentation
  - Before the meeting:
    - OEPO distributes materials -
    - Business Case
    - Resource Requests
    - Initiative Budget
    - OEPO Statement of Analysis
  - In the meeting:
    - OEPO distributes OEPO Statement of Analysis
    - Initiative team presents proposal
    - OEPO requests straw poll using gradients of agreement; returns to the Initiative Team
  - After the meeting:
    - OEPO posts the Business Case, Resource Requests, and the budget on the OE website - questions/comments are directed to the Initiative Team
- Meeting #2 – Initiative Requests a Recommendation
Before the meeting:
OEPO distributes materials
- (revised) Business Case
- (revised) Resource Requests
- (revised) Initiative Budget
- (revised) OEPO Statement of Analysis

In the meeting:
- OEPO (revised) OEPO Statement of Analysis
- Initiative team presents any proposal changes
- Initiative team requests recommendation
- OEPO facilitates a vote of hands of CC members using gradients of agreement (a decision process tool)

After the meeting:
- OEPO posts (revised) Business Case, Resource Requests, and the budget on the OE website - questions/comments are directed to Initiative Team
- OEPO posts the Coordinating Committee recommendation on the OE website

Decision by OE Executive Committee
- Before the meeting:
  OEPO distributes materials -
  - Business Case
  - Resource Requests
  - Initiative Budget
  - OEPO Statement of Analysis
  - Coordinating Committee Recommendation
- In the meeting:
  - Initiative Sponsors/Manager answer questions discuss proposal
  - The Executive Committee discusses and makes a decision on the proposal
- After the meeting: OEPO posts the Executive Committee decision on the OE website
“Analyze Proposals” includes:

- Feasibility analysis
  - Line of accountability, sponsors, functional ownership, buy-in
  - Reasonable timeline for implementation and savings realization

- Financial analysis
  - Reasonableness of the budget and financial projections
  - Return on investment
  - Investment requirements and savings contribution for the OE Program

- Risk analysis
  - Constraints
  - Interdependencies
    - Enable other priority projects for the campus
    - Eliminate the need for other systems
    - Dependent upon the completion of another project
    - Impact on other projects, processes, or systems
  - Capacity - across the campus including OE and non-OE activities
    - Same implementer population for multiple projects
    - IT capacity
    - Existing skill sets
    - Changes in workload - shift, increase, decrease
  - Sequencing
  - Public relations aspects
  - Legal issues