





# Initiate Phase Overview

In this phase, the HR-Project Selection Committee conducts the *Project Selection Review* of the proposed project to determine if it is a sound & viable project worthy of funding & support, and inclusion into the HR-Project Portfolio. If approved, the project is prioritized within the portfolio and the Project Manager is authorized to proceed with project team formation & project planning activities through the approval of the Project Charter. It is understood that changes may have to be made during project planning and execution as more information becomes available, especially with larger projects. Projects involving a new IT system implementation and/or a change to an existing IT system are presented to the HR-Systems Steering Committee (HR-SSC) for identifying the most viable delivery schedule.

## Participants

<p><b>Executive Sponsor</b></p> 	<p><b>Project Sponsor</b></p> 
<p><b>Project Manager</b></p> 	<p><b>Project Governance HR-PMO</b></p> 
<p><b>HR-Project Selection Committee</b></p> 	<p><b>HR-System Steering Committee</b></p> 
<p><b>Subject Matter Expert(s)</b></p> 	<p><b>Information Security</b></p> 
<p><b>Functional Manager</b></p> 	<p><b>Procurement</b></p> 
<p><b>Project Stakeholders</b></p> 	<p><b>Budget</b></p> 

## Inputs

<p><b>Business Case</b></p> 	<ul style="list-style-type: none"> <li>Strategic Alignment</li> <li>Business Needs Statement</li> <li>High-level scope</li> <li>Feasibility</li> <li>High-level risk assessment</li> </ul>
<p><b>Regulatory Demands</b></p> 	<ul style="list-style-type: none"> <li>Legislations / Standards</li> <li>University Policies &amp; Procedures</li> <li>Market demands</li> <li>Audit findings</li> </ul>
<p><b>Agreements</b></p> 	<ul style="list-style-type: none"> <li>Service Level Agreements (SLAs)</li> <li>Organizational Structure</li> </ul>
<p><b>Institutional Data</b></p> 	<ul style="list-style-type: none"> <li>Historical processes</li> <li>Historical project documentation</li> <li>Performance indicators</li> </ul>

## Objectives

- Confirm the Project Manager
- Draft the Project Charter
- Define and communicate **what** the project is to the *Project Selection Committee*
- Conduct the *Project Selection Review* to determine if the project will be included in the HR-Project Portfolio
- Authorize** the Project Manager to proceed with project planning
- If not already completed before project initiation, an Information Risk Assessment may also have to be conducted.
- Depending on the impact to stakeholders, organizational change management should also be started with key stakeholders being identified and included in project initiation and kickoff.

## Expertise

- Project Management expertise
- Organizational knowledge
- Technical expertise
- Process owners
- Subject Matter Experts
- Change management expertise
- Industry standards & best practice knowledge

## Activities, Tools & Techniques

- Brainstorming
- Stakeholder analysis / perception inventory
- Client analysis
- Root cause analysis
- RACI to clarify influence, roles & responsibilities
- Conflict resolution

## Outputs & Exit Criteria

<p><b>Project Charter (Approved)</b></p> 
<p><b>Project Repository Setup</b></p> 
<p><b>Information Risk Assessment (Completed if applicable)</b></p> 
<p><b>Stakeholder Register/ RACI Matrix (Draft)</b></p> 
<p><b>Change Management Plan (Draft)</b></p> 
<p><b>Project Status Report</b></p> 