

# **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.



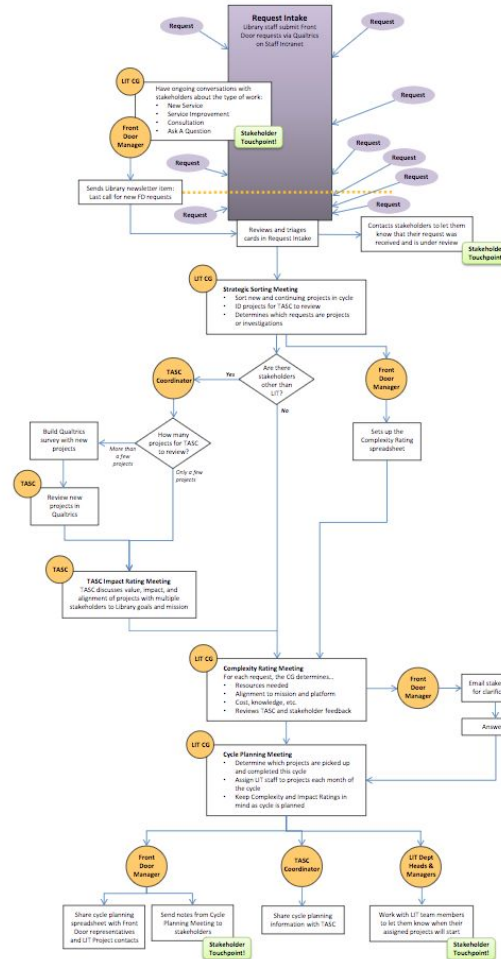
June	Cycle 1 Planning	Month 4
July	Month 1	
August	Month 2	
September	Month 3	
October	Month 4	Cycle 2 Planning
November		Month 1
December		Month 2
January		Month 3
February		Month 4
March		Month 1
April		Month 2
May		Month 3
June	Cycle 1 Planning	Month 4
July	Month 1	

**LEGEND**

□ Cycle Planning (initial work done by UTC) and (post-Open Meeting to be done by UTC)

- Cycle Planning:** Initial work done by UI/CG and Front-Door Manager to evaluate new projects. See Front-Door and Cycle Planning workflow for details.
- Monthly check-in:** UI/CG leads review project progress; project leads share progress on active work.
- Stakeholder Satisfaction Assessment:** Primary stakeholders are asked about their satisfaction with the work on their project. Data is used to make process improvements.
- Midcycle Review:** UI/CG reviews progress on projects, adjusts schedule as needed.
- End of Cycle Evaluation:** Primary stakeholders in current cycle are asked to comment on how their projects went.

## LIT Front Door and Cycle Planning Workflow

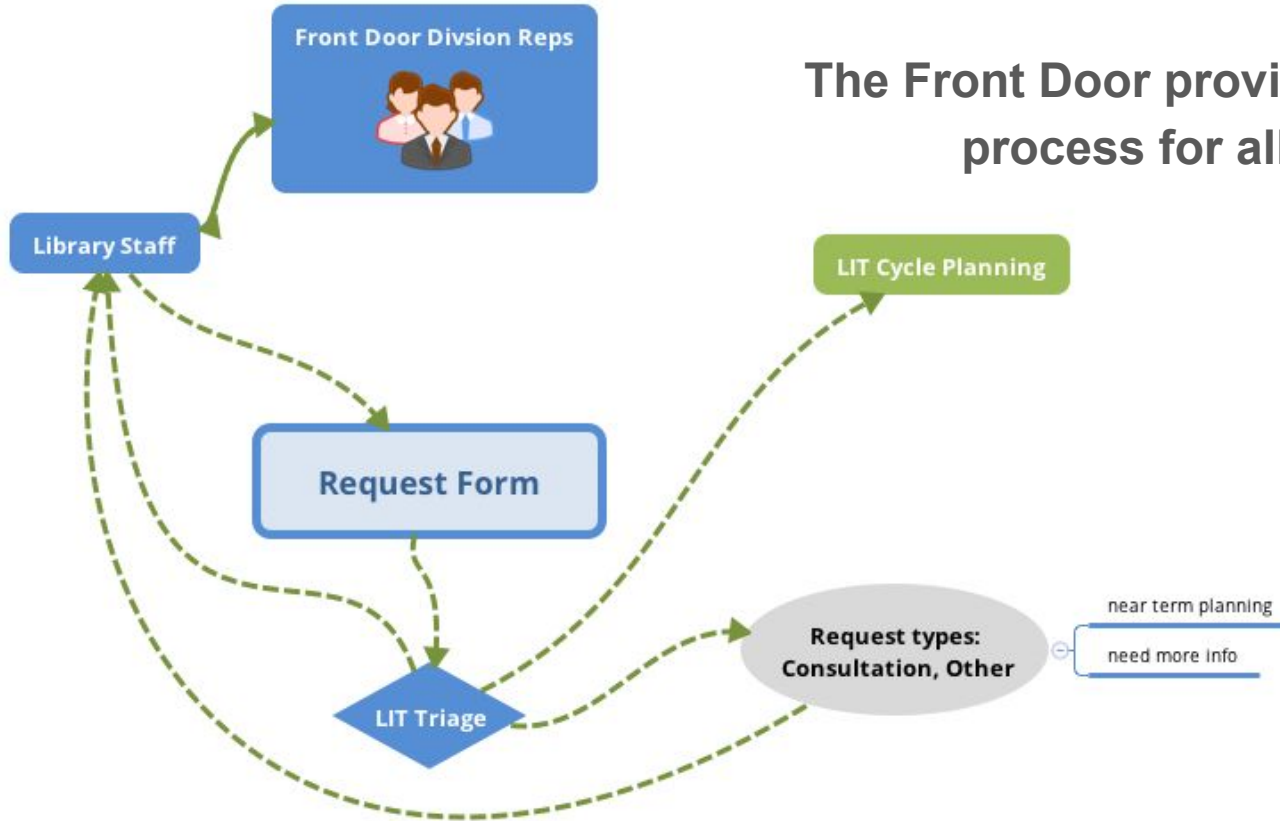


**New Cycle Starts!**

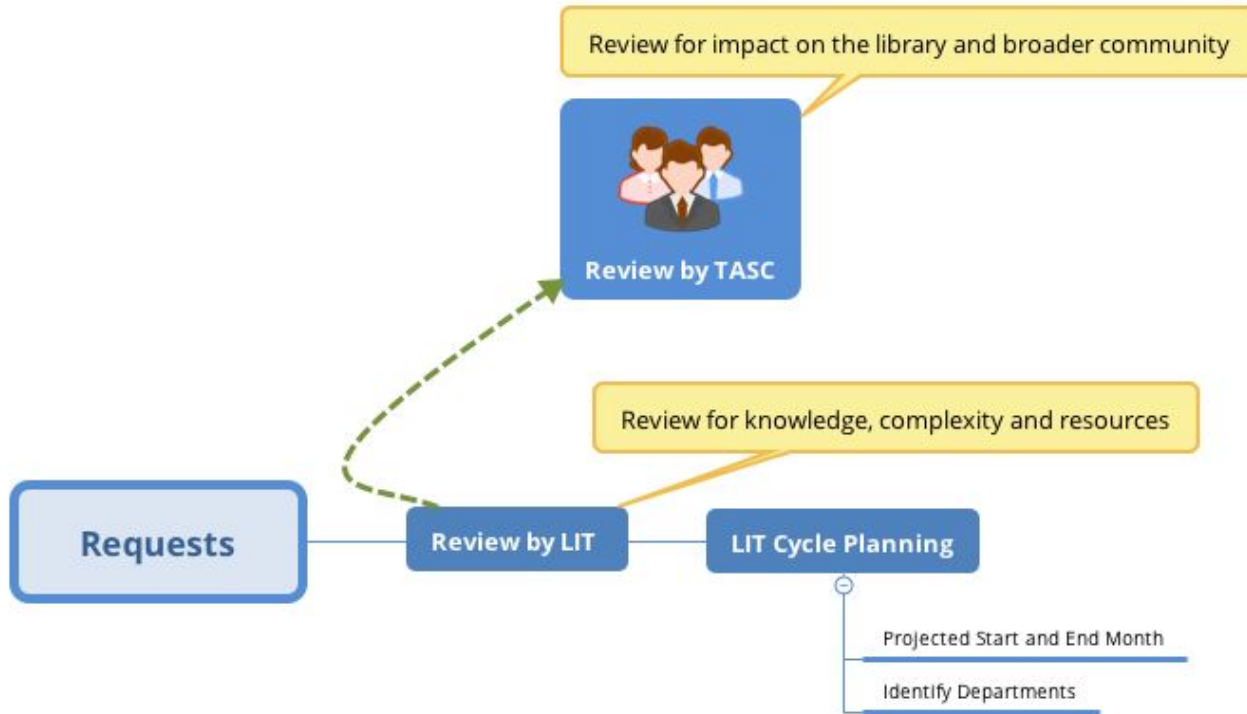


# Front Door: Request Intake Process

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](mailto:njaffer@umich.edu)).

Request Type:

Consultation

Service Improvement

New Service

Other







# Cost and Complexity Review by LIT

## Investigations

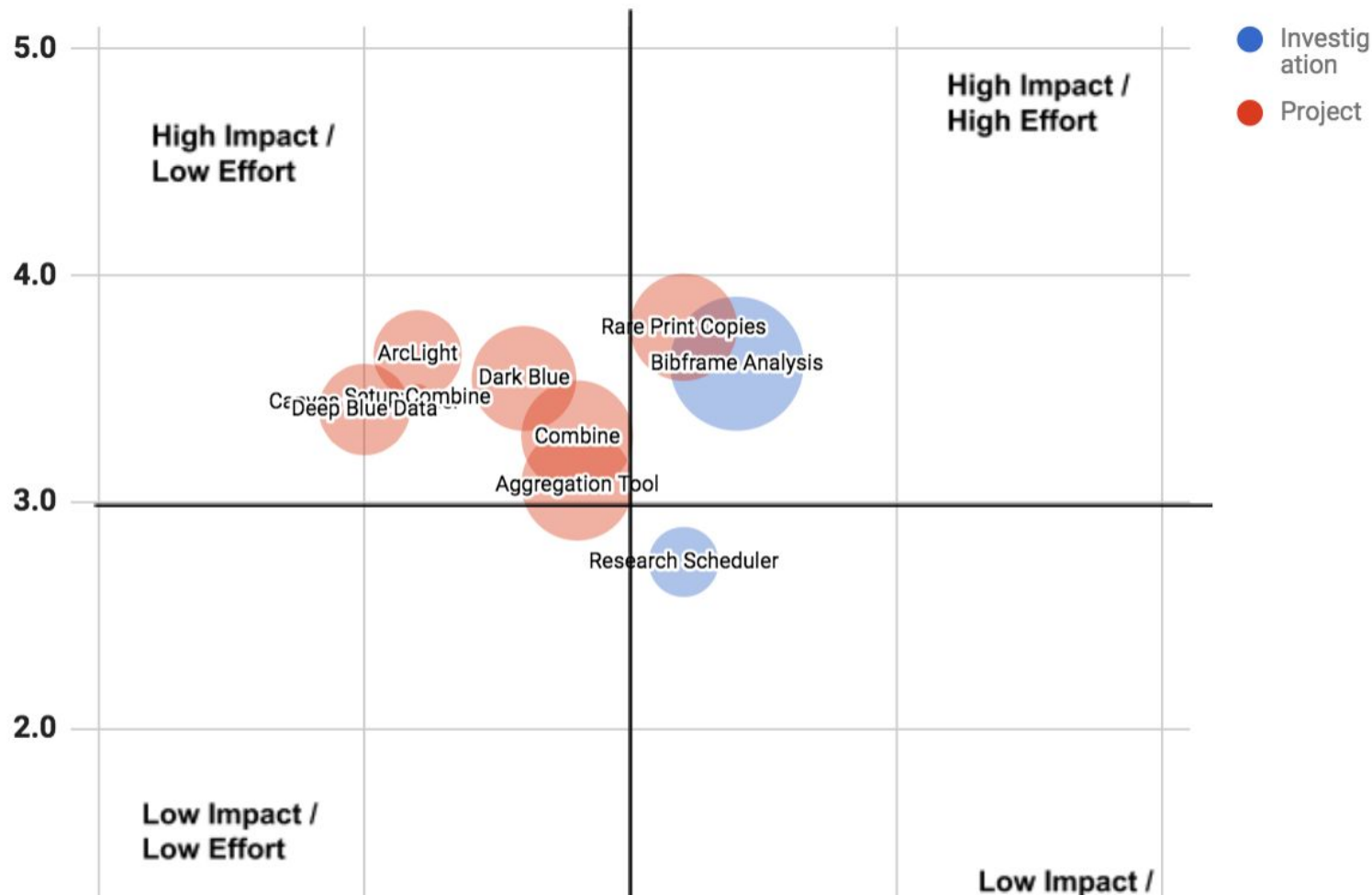
Complexity Factors							Cost Factors							
Request Short Name	Domain	Investigation Scope	Technical Knowledge/ Expertise	Team Scope			Total Complexity Score	Cost	Potential Divergence from Platform			Total Cost Score		Weighted Effort Score
Research Scheduler	LIT+1(L&T)	medium-high	low-medium	medium-high			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
							Total Complexity Score					Total Cost Score		
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

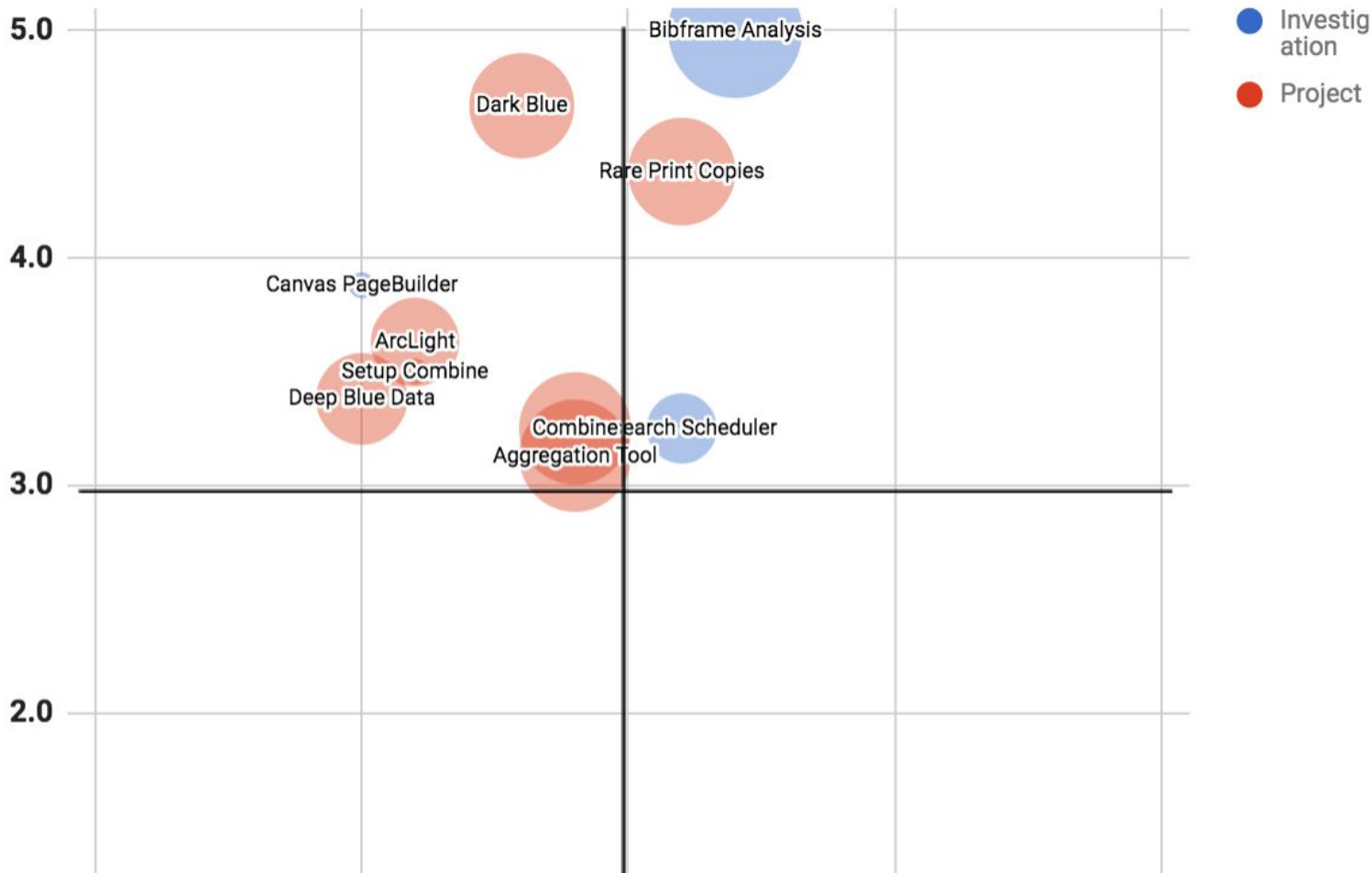
# Impact Review by Broader Library (TASC)

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



[illegible]

Spreadsheet works but how  
about a web app!!





All Fields ▾

Search...

Search 🔍

Activity Type ▾

Project	61
Investigation	18
TASC Investigation	3

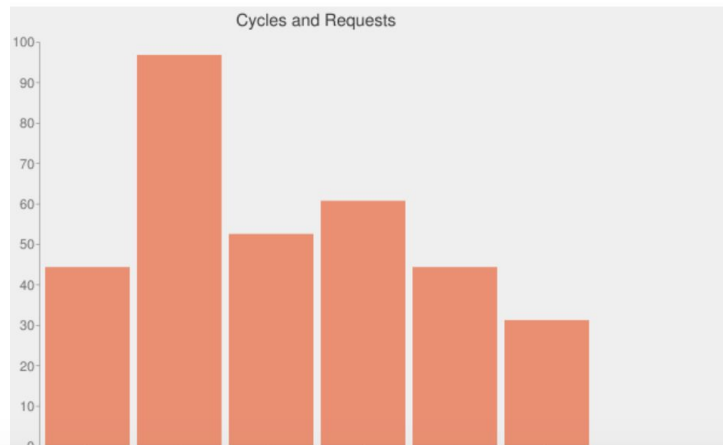
Request Cycle &gt;

Start Cycle &gt;

Card Status &gt;

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](mailto:njaffer@umich.edu)**

## **Acknowledgments**

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

