

# California Digital Library Strategic Vision

## CDL Cross Program Proposals

This document outlines a methodology for how potential projects (operational, technical, etc.) that cross CDL programs can be surfaced, explored and completed.

Which potential projects should be evaluated in this manner?

- Projects that involve or have impact on multiple CDL programs
- Projects that will significantly benefit CDL and its stakeholders in one or more ways: improved efficiency, improved user experience, better service to UC campuses or non-UC stakeholders, etc.

## Submit a Proposal

CDL leadership encourages staff to consider and submit cross-program project proposals as an integral component of ongoing, organization-wide strategic planning. Given the degree of upfront effort needed to produce substantive proposals, Cabinet encourages informal groups to self-organize to consider issues or problems of common concern and strategic importance.

In framing a proposal, groups or individuals should address the following:

- Why? Justification or problem statement
- What? Goals and deliverables
- So what? Impact of both doing and not doing the proposed work
- How? Implementation plan or methodology (iterative / MVP)
- Who? Resources (anticipated staff – roles and time commitments, funding, infrastructure)
- When? Work timeline
- Where? Sustainable operational and developmental responsibility for work outputs

This proposal should also include a statement of conditional support (or disagreement) from the affected program directors.

## Proposal Review

Proposals will be accepted quarterly and evaluated by Cabinet within one month of the submission date. Cabinet will determine whether proposals are in accordance with CDL's strategic vision and priorities and will:

- Approve for implementation as described (skip to "Create a Project Team" below)
- Conditionally approve with modified parameters of scope, resources, or timeline (skip to "Create a Project Team" below)

- Table for future consideration, pending further investigatory work by an Explore Team
- Reject for clearly stated reasons

## Create an Explore Team (if deemed necessary)

If the evaluation of a proposal indicates that more in-depth investigation is necessary, Cabinet will empanel a formal Explore Team with a specific charge and timeline. Explore Teams will include a Cabinet member liaison (chosen by Cabinet) and a participant in the development of the original proposal.

The Cabinet member liaison consults with Cabinet/Tech Council and forms an ad-hoc Explore team. A Team Lead is identified to organize this effort.

Explore Team Lead is responsible for:

- Keeping the work of the Explore Team aligned with the charge and identifying specific roles/activities for Team members.
- Ensuring that the Explore team produces a final report addressing the specific questions/concerns voiced by cabinet in the initial proposal review.
- Presenting the team's final report and recommendations to Cabinet.

## Explore Report Review

Cabinet reviews the Explore Team's final report, considers recommendations and determines whether or not to proceed with project and, if so, in what form.

- If Cabinet approves the project, it also reaffirms the specific scope of work, resource allocations, and sources of those resources. Cabinet also indicates required status update intervals. The Cabinet member Liaison then works to establish the Project Team (see below).
- If Cabinet does not approve the project, it provides an explanation as to why this project will not be pursued.

## Create a Project Team

The Cabinet member Liaison consults with Cabinet/Tech Council to establish a Project Team based on expertise, interest and availability. This team may or may not have the same members as the group that originally proposed the project or those who served on the Explore team.

Project team will identify a Project Manager with the following responsibilities:

- Producing a project plan with timeline/deliverables
- Managing the day-to-day resources and work of the Project Team
- Ensuring that the timeline is adhered to and the deliverables are met
- Providing regular status reports to Cabinet

Subsequent to launching the Project Team and identifying a Project Manager, the Cabinet member Liaison will be responsible for:

- Serving as the temporary manager of all Project Team members in the context of their work on the Team. This includes working with formal managers to ensure appropriate resource allocations between cross-CDL project and program priorities.
- Ensuring the Project Team engages in team start-up activities, e.g., confirming understanding of the scope and timeline of the project, establishing roles and responsibilities, setting ground rules and expectations for participation, agreeing on how decisions will be made.
- Ensuring the Project Team provides regular progress reports and completes the project within the time frame identified by Cabinet.

## Project Review

Cabinet will work with Cabinet member Liaison and Project Manager to periodically review and evaluate progress toward the original project goal. Tech Council will also receive regular updates on the progress of the work. Cabinet will consider any shifts in organizational priorities or resources as the project unfolds -- and will course-correct as necessary.

Cabinet will confirm final project completion and will ensure proper resource allocation for ongoing support of project deliverables and outcomes.