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The ASSIST Board of Directors maintains primary responsibility for authorizing and prioritizing ASSIST projects. The following process and criteria have been developed to guide the work of the ASSIST Board as new projects are proposed and existing projects are re-prioritized. The criteria are intended to inform Board deliberations as a broad range of issues are considered, they are not intended to serve as a litmus test that every project must meet in order to attain approval.

Organizations or individuals that may propose ASSIST projects should consider this process and the criteria to help ensure that proposed projects fall within the overall scope and priority of ASSIST.

The ASSIST Coordination Site shall be responsible for shepherding the process and shall include analysis of these criteria in the written ASSIST Project Proposals that go to the ASSIST Technical Advisory Committee (TAC) and the ASSIST Board of Directors (Board) for review and approval.

The ASSIST Software Development Framework Process

All projects related to new or enhanced functionality of ASSIST software are expected to also follow the ASSIST Software Development Framework (SDF) process. The SDF outlines the general review, reporting, and approval processes that the Coordination Site and Board are to follow when pursuing a software development project. The SDF process does not address the manner in which costs for a project are determined or the criteria the Board should use when reviewing and approving individual projects (the latter is the purpose of this document). The following is a brief recap of the salient points from the Framework that apply to this document.

The ASSIST SDF calls for written Project Proposals to be developed by the Coordination Site (possibly in collaboration with other agencies, system offices, organizations, or individuals). Project Proposals must be approved by the ASSIST TAC (for review of technical feasibility and issues) and then the ASSIST Board before any significant work continues. For most projects the written Project Proposal will outline the idea in general terms and include as many appropriate details as are able to be known at the time. The intent of the Project Proposal is to provide enough information to ASSIST TAC and Board members so that they can approve the next step which calls for further work to develop specific design specifications and functional requirements. The Definition of Functional Requirements for any project also requires TAC and then Board approval before work continues. It is possible that the Board could approve a Project Proposal, in order to authorize further investigation, but eventually not approve the continuation of the project after reviewing the Definition of Functional Requirements and deciding that the project is either too costly, falls beyond the desired scope of ASSIST, or suffers from some other problem that cannot be resolved by refining the proposal.

Process for Developing, Reviewing, and Approving Proposed Projects

While most ideas for ASSIST projects originate from the ASSIST Board and ASSIST Coordination Site via regular meetings and the ASSIST Strategic Plan, external organizations or individuals as well as the various system offices may also propose projects. The following are

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key points regarding the process for developing, reviewing, and approving any proposed projects.

- The Coordination Site may develop proposals related to the goals/objectives/activities in the ASSIST Strategic Plan or other ideas that are generated by the Board, segmental offices, campuses, or other collaborations.
- The Coordination Site may also develop proposals related to significant internal projects that are required to maintain the long-term viability of ASSIST and the ASSIST software.
- External organizations or individuals may submit proposals via the ASSIST Coordination Site where Coordination Site staff and the ASSIST Board Workgroup will review them for completeness and assess their viability.
- At the earliest possible time when the Coordination Site begins working on developing an idea for a project (either on its own or in collaboration with a system office, external agency, other organization, or individual) the ASSIST Board Workgroup will be notified of the idea and provided with basic information about the potential proposal. Workgroup members may convey information about initial ideas to their respective communities remembering that ideas at this stage are only proposals and that they will have an opportunity for full review and approval by the Board. This is intended to help ensure that significant work on developing ideas results in written Project Proposals that are acceptable to the principle agencies on the ASSIST Board. It is the responsibility of Board Workgroup members to communicate any potential ideas or issues with others in their system, the Coordination Site, or the full Board.
- The Coordination Site shall work with the Board Workgroup as appropriate to estimate costs and resources required to complete proposed work and provide a preliminary evaluation of proposals using the criteria listed later in this document.
- The Coordination Site shall distribute proposals and related information to the full Board for review, comment, and approval either during regularly scheduled Board meetings or via email. As needed, Board members may direct the Coordination Site to facilitate subsequent meetings or conference calls to discuss proposals in more detail.
- Any projects involving ASSIST software development or enhancement shall follow the process established in the ASSIST Software Development Framework (SDF). A full description of the ASSIST SDF is available on-line via the ASSIST Information Center web site. The ASSIST SDF requires the ASSIST Technical Advisory Committee and ASSIST Board to review and approve work at various steps along the project proposal and development processes.
- The ASSIST Board shall approve, reprioritize, or deny projects and shall direct the Coordination Site to do any related development/implementation work.

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- The Coordination Site shall report to the Board on the status of projects as appropriate and as described in the ASSIST SDF.

Criteria/Preferences for Considering New Projects

The following criteria are intended to help guide Board decisions on approving or denying individual written Project Proposals. These criteria are not necessarily intended to serve as a litmus test that every project must meet in order to attain approval.

- Proposed projects should fit within the mission, vision, goals, and objectives of ASSIST as stated in the most current ASSIST Strategic Plan, unless the Board is consciously changing the mission, vision, goals, or objectives in approving a project
- Proposed projects should address customer needs
 - If the customer needs that are to be addressed by a proposed project have not been clearly established by the Board, the proposal should provide compelling documentation of customer needs in order to better inform Board deliberations
 - ASSIST customers include students, counselors, academic advisors, articulation officers, faculty, and other staff (including those at system offices)
- Proposed projects should, to the greatest extent possible, address issues with a scope that is intersegmental, statewide, and covers the breadth of college/university transfer curriculum
- Proposed projects should represent appropriate benefits for costs
 - Short-term and long-term benefits and costs should be considered including commitments of staffing, operating costs, hardware/software, and campus/system office staff workload
- Proposed projects should either be able to be developed and implemented within current resources (staffing, technologies, etc.) or identify what additional resources will be required
 - Some proposed projects may include additional funding from an outside organization/agency/system office that is intended to either support additional required resources (staffing, technologies, etc.) or to offset current resources thus allowing additional funding to be used to meet other ASSIST priorities
- Proposed projects should meet established State, California Education Roundtable (CERT), and/or CCC/CSU/UC segmental goals
- Proposed projects that benefit independent colleges and universities should not detract from services to public institutions
- Proposed projects should enhance and not duplicate other existing efforts, projects, or initiatives throughout the State

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- Proposed projects should include appropriate collaboration with related projects or initiatives
- When applicable, consideration of proposed projects should be given to the short-term and long-term consequences of eliminating or integrating existing services

Prioritizing New and Existing Projects

Most projects will have an impact on existing resources (staff, technologies, etc.) and the written Project Proposals should address this potential impact. The Coordination Site shall be responsible for informing the Board of internal priorities that may be affected by a proposed project. The Board shall decide significant changes in priority for projects. Additionally, there may be times when multiple, simultaneous projects need to be prioritized by the Board in order to better focus resources. While many of the above criteria will influence priorities, the following items should be used for primary consideration in determining priority:

- The relationship of projects to ASSIST, State, CERT, and/or CCC/CSU/UC system goals
- Customer groups affected by projects - students, advisors, faculty, articulation officers, system offices, other organizations/agencies, etc.
- The overall scope and impact of projects - intersegmental, statewide, across college/university transfer curriculum, etc.
- The length of time projects are anticipated to require for completion – less important fast projects may be given temporary priority over more important long-term projects
- The impact projects may have on delaying or lowering the priority of other important activities