



Service Partnership Agreement – Coversheet
By and Between
[Department]
AND
Business Affairs
Financial Services Units

Effective Date:

This Agreement represents a Service Partnership Agreement (“SPA”) between Business Affairs Shared Services (BASS) and [Department] for the provisioning of administrative support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Administration, Purchasing & Accounts Payable, and Travel
- Budget and Finance
- Communications and Web
- Human Resources
- Information Technology
- Project Management

Agreement Period

This Agreement remains valid until terminated by either party or superseded by a revised agreement mutually endorsed by both parties. Both parties will review this Agreement annually. Amendments may be made to this agreement at any time, but any changes to this agreement must be agree upon in writing by both parties. This Agreement is valid from the Effective Date outlined above. Either party may terminate this Agreement with at least 180-day notice. Financial Services agrees to take whatever means are necessary to fully transition functions back to [Department] or to whomever it designates prior to the termination date.

Approval

(By signing below, all Approvers agree to all terms and conditions outlined in this Agreement.)

Ada Korhonen

Director, Organizational Administration & Shared Services

Financial Services

[Department Contact]

[Title]

[Department]

Signature

Signature

Date

Date

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Administration, Purchasing & Accounts Payable, and Travel Services

Partnership Agreement By and Between

[Department]

AND

Business Affairs

Financial Services - Administration

Introduction

This Agreement represents a Service Partnership Agreement (“SPA”) between Business Affairs Shared Services (BASS) and [Department] for the provisioning of administrative support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Administration
- Purchasing & Accounts Payable (AP)
- Travel

Cost

No charge to the department for services outlined in this agreement, unless otherwise stated.

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-5:00pm. For general inquiries, please contact BASS Admin Team at bass-admin@ba.arizona.edu.

Request Prioritization

Description	Target Response Time
Critical	2 Hours
High	8 Hours
Medium	48 Hours
Low	5 Days
Very Low	30 Days

If no priority, the standard response time is 48 hours.

Departmental Responsibilities

- Prepare and submit all required information in a timely and accurate manner
- Familiarize staff with FSO Administration administrative, purchasing, and travel procedures and standards
- Submit required information using forms and format provided by FSO Administration

Additional information and resources for services can be found at <https://www.fso.arizona.edu/shared-services>.

1. Administrative Support

Services Provided
<ul style="list-style-type: none">• Completion of required forms and memos for orders or in compliance with other campus departments on campus.• Oversight of asset management for the department including submission and approval of surplus requests and participation in semi-annual asset inventory requirements.

- Manage requests for keys and building access security. Provide backup approval for key and building access security requests. *(Optional – Not always applicable)*

2. Purchasing and Accounts Payable

Services Provided
<ul style="list-style-type: none">• Requisitions (REQS), Purchase Orders (PO), Payment Requests (PREQ), Disbursement Voucher (DV), Vendor Maintenance• Reconciliation of Purchasing Card (PCARD) transactions• Act as departmental PCard Liaison• Setting up, managing, and processing Independent Contractor forms (ICONS)• Guide department on Purchasing policies and rules as well as best practices for purchase methods/allowability

3. Travel

Services Provided
<ul style="list-style-type: none">• Completion and routing of travel authorization• Booking approved travel arrangements in conjunction with traveler, including flights, hotel, and registration• Processing and settling travel advances, if needed• Completion and routing of travel expense reimbursements• Share best practices, tips, and guidelines

Budget and Finance Services
Partnership Agreement By and Between
[Department]
AND
Business Affairs
Financial Services - Administration

Introduction

This Agreement represents a Service Partnership Agreement (“SLA”) between Business Affairs Shared Services (BASS) and [Department] for the provisioning of budgetary and financial support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Budget and Resource Planning Support
- Accounting and Financial Support

Cost

No charge to the department for services outlined in this agreement, unless otherwise stated.

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-5:00pm. For general inquiries, please contact BASS Budget and Finance Team at bass-finance@ba.arizona.edu.

Request Prioritization

Description	Target Response Time
Critical	2 Hours
High	8 Hours
Medium	48 Hours
Low	5 Days
Very Low	30 Days

If no priority, the standard response time is 48 hours.

Departmental Responsibilities

- Prepare and submit all required information in a timely and accurate manner
- Familiarize staff with FSO Administration accounting, budget, and related fiscal procedures and standards
- Submit required information using forms and format provided by FSO Administration

Additional information and resources for services can be found at <https://www.fso.arizona.edu/shared-services>.

1. Budget and Resource Planning Support

1.1 Budget Methodology

Services Provided
<ul style="list-style-type: none">• In conjunction with department, establish annual financial plan• Manage fiscal year close and open activities• Facilitate scheduled meetings to review balances and financial plan• Develop and provide dashboards in Analytics for real time access to reports

- Salary and benefits analysis and forecasting

1.2 University Budgeting Processes

Services Provided
<ul style="list-style-type: none"> • Facilitate the All Funds Multi Year Planning (AFMY) process, submit final data and report per University procedure on behalf of department • Manage position funding per plan, including creating and modifying positions as needed • Submit all Requests for Budget Changes (RBC) per financial plan • In conjunction with department, submit changes to grants budgets • Assist in any required annual or close reporting and account maintenance • Manage annual technology allowances process; Documenting budgetary impact and providing guidance and guidelines for eligibility; Consulting on communication process.

2. Accounting and Financial Support

Services Provided
<ul style="list-style-type: none"> • Prepare monthly account reconciliation • Monitor accounts for emerging issues, statutory compliance, accuracy, and cash flow needs • Manage and report on project funding as requested by department • Provide ad hoc financial reports • Research and Sharing of Best Practices • Financial Systems Document Creation • Backup approvals • Monitoring transactions for appropriateness and compliance • Creation of accounts – Management of Workflow and Chart of Accounts

Communications and Web Services
Partnership Agreement By and Between
[Department]
AND
Business Affairs
Financial Services - Administration

Introduction

This Agreement represents a Service Partnership Agreement (“SPA”) between Business Affairs Shared Services (BASS) and [Department] for the provisioning of administrative support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Communications
- Web Support

Cost

No charge to the department for services outlines in this agreement, unless otherwise stated.

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-5:00pm. For general inquiries, please contact BASS Communications Team at bass-communications@ba.arizona.edu.

Request Prioritization

Description	Target Response Time
Critical	2 Hours
High	8 Hours
Medium	48 Hours
Low	5 Days
Very Low	30 Days

If no priority, the standard response time is 48 hours.

Departmental Responsibilities

- Adherence to all applicable University and FSO Shared Services policies, processes, and procedures.
- Maintenance of department specific documentation.
- Reasonable availability of department representative when resolving an issue or request.
- Timely response to requests for information and details.
- Submit required information using forms and format provided by FSO Communications.

Additional information and resources for services can be found at <https://www.fso.arizona.edu/shared-services>.

1. Communications and Branding

Services Provided
<ul style="list-style-type: none">• Ensuring branding meets university branding requirements and standards• Review and editing of content before publication• Consulting on audience and methods of communication

2. Managed Web Hosting & Website Support

Services Provided
<ul style="list-style-type: none">• Management of Service Level Agreement for Campus Web Services with UITs• Pantheon Hosting Packages:<ul style="list-style-type: none">○ Access to hosting packages at our negotiated rates with Pantheon Systems, Inc.○ Typical hosting costs per site: \$240/year○ The provided Pantheon Hosting Packages encompass the infrastructure and capacity aspects of providing a web site such as storage for files, network connectivity, maintenance of servers, backups, and other server related items.• Hosting administration, oversight<ul style="list-style-type: none">○ A secure environment for hosting.○ Managed TLS certificates to provide https via Let's Encrypt.○ Automated nightly backups.○ Edge caching provided by Pantheon's Global CDN for faster page loads.○ Dev, Test and Live environments to ensure smooth patching.○ Multi-dev environment available for ongoing development.○ 24/7 monitoring provided by Pantheon• Website design services and consultations• Content management or support as requested

Human Resources Services
Partnership Agreement By and Between
[Department]
AND
Business Affairs
Financial Services - Administration

Introduction

This Agreement represents a Service Partnership Agreement (“SPA”) between Business Affairs Shared Services (BASS) and [Department] for the provisioning of administrative support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Recruitment
- Employee Relations
- Workforce Planning
- Payroll and Leave Management
- System Access

Cost

No charge to the department for services outlined in this agreement, unless otherwise stated.

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-5:00pm. Specific requests for after-hours issues shall be accommodated. For general inquiries, please contact BASS Human Resources at bass-hr@ba.arizona.edu.

Transaction Turnaround time and notification expectations

Due to administrative requirements when submitting transactions involving new hires, promotions, terminations, reclassifications, and title changes as much advance notice as possible should be provided, but no less than the following accompanied by the required documentation:

Transaction Type	Required Notice	Required Documentation
New Hire – Staff*	2 weeks	Supervisors New Hire Checklist
New Hire – Student*	2 weeks	Supervisors New Hire Checklist
Promotions	1 week	Job Description/Resume
Reclassifications	1 week	Job Description/Resume/Memo of Explanation
Title Changes	1 week	Job Description/Resume/Memo of Explanation
Terminations	As soon as possible	Letter of resignation

*International hiring will take longer to process, up to 2 months.

Request Prioritization

Description	Target Response Time
Critical	2 Hours
High	8 Hours
Medium	48 Hours
Low	5 Days
Very Low	30 Days

If no priority, the standard response time is 48 hours.

Departmental Responsibilities

- Adherence to all applicable University, Human Resources, and FSO Shared Services policies, processes, and procedures.
- Maintenance of department specific documentation.
- Reasonable available of department representative when resolving an issue or request.
- Timely response to requests for information and details.
- Submit required information using forms and format provided by FSO Administration

1. Recruitment

1.1 Recruitment

Services Provided
<ul style="list-style-type: none"> • Provide template for and consultation on job posting details • Manage recruitments within the UACareers and Handshake systems, including posting, moving through workflow, and position dispositions with input from department • Serve as primary HR department contact for all recruitment for both applicants and department • Consult on strategies for specific hiring needs, including recommending recruitment methods targeted to specific groups of candidates • Manage budgetary allocation for posting type, through position funding • Consult with and advise hiring Supervisor and hiring committees on recruitment best practices; committee composition; University standards, and compliance • Consult on best practices for pre-employment screenings; reference checks work history, education, criminal history background checks, and any other required pre-employment testing • Manage offer process and partner with central HR to ensure internal and external equity • Consult with hiring supervisor to establish start date • Manage new hire paperwork process in UAccess Employee • Provide templates and consult on best practices for departmental new employee onboarding activities

1.2 Onboarding

Services Provided
<ul style="list-style-type: none"> • Manage onboard checklists; including enrollment in appropriate orientations • Manage new hire paperwork; including I-9, e-Verify, etc • Consult with supervisor to assist with communication to new employee regarding job description, departmental expectations, required training, etc. • Ensure UAccess Employee is updated with current position information. • Maintain recruitment files as the office of record

2. Employee Relations

2.1 Performance Management

Services Provided
<ul style="list-style-type: none"> • Manage communication regarding evaluation due dates and overall completion rates. Collect evaluations, and track completion • Consult with managers/supervisors or employees to resolve performance-based disagreements, providing coaching and feedback • Consult with managers/supervisors in development of written performance standards and crafting constructive feedback

2.2 Consultation

Services Provided
<ul style="list-style-type: none"> • Provide supervisors/managers information on how to constructively coach and focus attention on key aspects of employee behavior • Provide supervisors/managers/employees with additional human resources support when needed for various issues • Serve as point of contact for consultation regarding policy and best practices, and as liaison to HR Alliance and Central HR consultants

2.3 Investigations, Grievances, Dispute Resolution

Services Provided
<ul style="list-style-type: none"> • Manage investigations which ensure preservation of confidentiality, sensitive materials and protection of both employee, managerial, and University rights • Consult with unit to develop and maintain cohesive work units with climates of cooperation and collaborative problem solving by identifying and mediating minor disputes • Consult with departments towards achieving objective resolution • Consult with department to identify core issues and conduct; follow up on recommended outcomes using disciplinary actions as appropriate • Provide meeting facilitation and track documentation of outcomes, assisting department with notifications, to include disciplinary letters as appropriate • Partner with Central HR regarding implications of grievances and corresponding impacts of recommended resolutions • Represent the University during grievances, contract disputes, arbitrations, state or federal investigation or external legal challenges • Consult with supervisors/managers on strategies for handling complex situations

2.4 Employee Separation

Services Provided
<ul style="list-style-type: none"> • Manage employee separation process and documentation

3. Workforce Planning

3.1 Consultation

Services Provided
<ul style="list-style-type: none"> • Consult department leadership to find workable solutions for staffing issues (Return to Work, Leave of Absence, FMLA), such as temporary assignments, work out of class, contract temp workers, workforce re-organizations and departmental transformations, etc. • Consult with department on retention strategies which align workforce with departmental objectives

- Consult with department leadership on appropriate recognition strategies, in line with University standards and collective bargaining agreements.
- Consult with department leadership on staff development through mentoring, cross-training, internships, campus staff organizations, professional associations, committee and task force assignments, and skill assessment programs
- Partner with Central HR, regarding complex disability management, workers compensation, and reduction in force issues
- Partner with Safety and Risk Services to identify and find solutions to accommodate or to minimize employee injury or worker's compensation issues
- Consult with department leadership on position and pay actions such as, equity reviews, reclassifications, and merit increases, etc.
- Partner with Central HR on appropriate compensation issues

3.2 Position Management

Services Provided
<ul style="list-style-type: none"> • Manage position description development and edit process • Process compensation and position adjustments • Processing Other Professional Service (OPS) documentation and Supplemental Compensation transactions

4. Payroll and Leave Management

4.1 Payroll Coordination

Services Provided
<ul style="list-style-type: none"> • Manage all payroll processes • Manage review and audit of time submittals for employees • Manage entry of pay adjustments due to employment change actions (work out of class, temporary appointment, etc.) • Communicate salary program guidelines • Inform managers and supervisors on payroll best practices for compliance • Communication resources for training and updates on policy • Partner with Central Payroll on complex pay issues

4.2 Leave Management

Services Provided
<ul style="list-style-type: none"> • Serve as FMLA coordinator, managing processes and ensuring compliance • Consult on leave management best practices, utilizing Central HR services as necessary • Send vacation carryforward emails to employees who are projected to be over their maximum end of year allowable balance

5. System Access

Services Provided
<ul style="list-style-type: none"> • Act as primary or back-up Access Provisioning Liaison (APL) to review and manage employee access requests to University Systems (<i>Optional – Not always applicable</i>) • Request accesses for new hires • Remove accesses for separations • Manage transaction workflow in UAccess Systems

Information Technology Services
Partnership Agreement By and Between
[Department]
AND
Business Affairs
Financial Services - Information Technology

Introduction

This Agreement represents a Service Partnership Agreement (“SPA”) between Business Affairs Shared Services (BASS) and [Department] for the provisioning of administrative support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Infrastructure, Data, and Information Security
- Equipment Management
- Software Management

Cost

No charge to the department for services outlines in this agreement, unless otherwise stated.

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-5:00pm. In the event of an emergency that involves servers or networks that are under FSO IT management and responsibility, FSO IT will respond as soon as possible to provide support whether it is during normal business hours or not.

Requesting Service:

Method / Contact	Typical Initial Response Time
Website: https://redmine.fso.arizona.edu (Available 24/7)	Within 24 business hours. Most requests are responded to within a few business hours.
Telephone: 626-3072 (Available 8am-5pm M-F)	Only used for emergency purposes or when Redmine is not available.

Redmine requests are the most efficient way to request a service. If there is no device available to initiate a work-request, telephone calls can be used to initiate contact with support. Telephone calls may also be used in situations where instruction or work with a deadline is interrupted by a technical issue, but FSOIT support will still create a work request through Redmine on the customer’s behalf.

Work requests are triaged based on a variety of factors that influence the customers technology environment and FSOIT working process.

Redmine User Guide:

https://redmine.fso.arizona.edu/projects/helpdesk/wiki/New_Help_Desk_System_%E2%80%93_User_Guide

Feedback about FSOIT service should be directed to Tyson Korhonen (korhonen@email.arizona.edu).

Request Prioritization

Description	Target Ticket Response Time
Immediate	Skip Ticket process and call 626-3072
High	2 Hours
Normal	24 Hours
Low	7 Days
On hold	Specified per ticket using the Due date field

If no priority, the standard response time is 48 hours.

Departmental Responsibilities

- Adherence to all applicable University and FSO IT policies, processes, and procedures.
- Appropriate incident and request prioritization as outlined in this document and in cooperation with FSOIT.
- Submissions via Redmine ticketing system of all service-related requests and any other special services with the IT organization
- Maintenance of all department specific documentation
- Appropriate use of supported applications and hardware
- Reasonable availability of Department representative when resolving a service-related incident or request
- Timely response to requests for clarification of incident and request details and priorities
- Consultation with FSOIT prior to introducing new software or hardware into the environment. Consultation with FSOIT prior to moving any desktop systems. This is to both ensure that we can adequately support the environment as well as maintain an auditable physical inventory as required by University policies.
- Ensuring all its staff members follow all security policies and standards issued by the UA ISO at <https://security.arizona.edu/content/policy-and-guidance>, especially the following two:
 - Data Classification and Handling (IS-S302): <https://security.arizona.edu/content/data-classification-and-handling-standard>
 - Security Awareness and Training (IS-S401): <https://security.arizona.edu/content/security-awareness-and-training-standard>

Departmental Requirements

- Submission of requests for service using Redmine. Telephone may only be used to submit urgent requests.
- Provisioning of access to supported computers
- Availability to support staff during standard service hours to answer questions that facilitate service delivery.
- Proof of licensing if needed when requesting software installation.

Boundaries of Services Features and Functions

Computer support is available for computers that meet the following criteria:

- The supported equipment is university property, not personally owned.
- Support technician administrative user access exists or can be created on the computer.
- FSO IT can re-image a computer when necessary to resolve an incident or complete a service request.

FSOIT Responsibilities

- Meeting response times associated with service-related incidents.
- Test results that indicate backup and data recovery commitments are met
- Training required staff on appropriate service support tools (i.e. Redmine)

- Appropriate notification and coordination to the business unit for all scheduled maintenance.
- Facilitation of all service support activities involving incident, problem, change, release, and configuration management
- Maintain current contact and escalation information
- Communication to all appropriate staff within [Department] regarding unit or University-wide incidents that may impact service availability
- Represent the Department as the IT Subject Matter Experts in support of university wide technology initiatives

1. Infrastructure, Data, and Information Security

1.1 Infrastructure, Data, and Information Security

Services Provided
<ul style="list-style-type: none"> • Active Directory and Group Policy management and design • Security management of stored data (excluding data stored in services not listed) • Network/Subnet/DNS/DHCP design and implementation • Network firewall management • Office 365 email account configuration and support • Office 365 Teams account configuration and support • Local Documents and Profile backup and restoration • Short Term IT equipment checkout • Technology Refresh recommendations • Print Server and Network Printer Maintenance (limited to 1 MFP for each physical space and special use printers) • Data migration to FSO Storage Infrastructure and O365 Teams • Network sharing audit • New MFP / copier deployment through AOT • Secure network-based scanning • Onboarding/off-boarding process and procedure • Desktop update management

1.2 Data Storage and Management

Services Provided
<ul style="list-style-type: none"> • Provide data storage, management, and backup service through 1 or more of the following: Office 365 Teams, Box, Docuware, Network Fileshare. • FSO data storage solution servers do not support hosting regulated data by default. Elevating a storage solution for regulated data storage may be requested by the department. Additional security and use agreements are required to meet each need and are developed collaboratively between the department and FSO IT.

2. Equipment Management

2.1 Plan/Purchase/Inventory Management

Services Provided
<ul style="list-style-type: none"> • Provide purchasing and computing inventory management • Assist with computer replacement planning

2.2 Deploy

Services Provided
<ul style="list-style-type: none"> New computers are configured with a continually changing set of software applications. A list of the current package is provided upon request and before each computer rebuild. Additional applications can be added to the standard set, assuming licensing requirements are met. Updates are performed for all standard applications. Specialty software is installed by request, assuming licensing and security requirements are met. Clients may be asked to provide installation media/keys and documentation for specialty software.

2.3 Computer Repairs

Services Provided
<ul style="list-style-type: none"> Support for computer warranty repairs includes equipment pickup, shipping, tracking, and return Non-warranty repair is provided for standard computers for which the extended warranty has expired. Repair by support technicians includes replacement of user-serviceable parts provided by the customer. Department may need to utilize a third-party vendor for non-user-serviceable part repair.

2.4 Printing and Scanning

Services Provided
<ul style="list-style-type: none"> Printing and scanning functions of standard networked printers and scanners are supported, including deployment and configuration of printer/scanner setting and registration.

2.5 Replace / Surplus

Services Provided
<ul style="list-style-type: none"> Coordination of computer disposal with Surplus Property. Data is securely erased, and data storage devices are destroyed prior to disposal.

3. Software Management

3.1 Manage Software Installation

Services Provided
<ul style="list-style-type: none"> Install and upgrade software to resolve software problems in response to customer requests due to changes to campus standards to meet security requirements. If FSO IT does not have proof of license or installation media, the customer requesting the installation must provide the media. Some software requires specialized configuration. FSO IT can configure software if documentation is available. In accordance with security policy, only software that is being actively updated / patched by the vendor will be installed. Exceptions may be made for university business or business systems that are not compatible with current software versions.

3.2 Software Troubleshooting Support

Services Provided
<ul style="list-style-type: none"> Provide assistance for software that is not launching or functioning properly. Problems with some business systems or specialized software may be referred to system specialists.

Project Management Services
Partnership Agreement By and Between
[Department]
AND
Business Affairs
Financial Services - Administration

Introduction

This Agreement represents a Service Partnership Agreement (“SPA”) between Business Affairs Shared Services (BASS) and [Department] for the provisioning of administrative support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Project Management

Cost

No charge to the department for services outlines in this agreement, unless otherwise stated.

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-5:00pm. Specific requests for after-hours issues shall be accommodated. For general inquiries, please contact BASS Project Management Team at outreach@fso.arizona.edu.

Request Prioritization

Description	Target Response Time
Critical	2 Hours
High	8 Hours
Medium	48 Hours
Low	5 Days
Very Low	30 Days

If no priority, the standard response time is 48 hours.

Departmental Responsibilities

- Adherence to all applicable University and FSO Shared Services policies, processes, and procedures.
- Understanding that every project is different and may require different approaches and not every service listed applies to every project.
- Maintenance of department specific documentation.
- Reasonable available of department representative when resolving an issue or request.
- Timely response to requests for information and details.
- Submit required information using forms and format provided by the Project Management team:
<https://www.fso.arizona.edu/outreach/request>

1. Project Management

Services Provided
<ul style="list-style-type: none">• Initiation<ul style="list-style-type: none">○ Transform project ideas into a business case and proposal for review and approval.

- Conduct cost-benefit analysis.
 - Identify stakeholders and determine their requirements and expectations.
 - Develop the project charter which can include; project description, scope, measurable objectives, assumptions, known constraints, risks, and roles/responsibilities.
 - Coordinate and lead project kickoff.
- Planning and Executing
 - Develop project plan which can include: Work Breakdown Structure with assigned resources, set schedules, document change request process, outline escalation plan, and gather estimates.
 - Create and utilize the communication plan.
 - Provide status updates which may take different forms depending upon the needs of the project but can include: lead steering committee meetings and send email updates to stakeholders as required.
 - Work with stakeholders to track and resolve any project issues.
 - Develop, schedule, and set expectations around sign-off for testing, quality assurance, and roll-out.
 - Work with project team through stabilization period.
- Closure
 - Ensure all project requirements are met and/or addressed.
 - Gain final acceptance.
 - Transition documentation, tasks, and product to appropriate owners or support team.
 - Facilitate lessons learned.