

The Project Blueprint – Case Study Example

The Why

A. Purpose

This is the executive summary, or an abstract, that captures the justification, the scope, and intended outcomes.

Disability Services is redesigning their interactive review process for determining reasonable accommodations in compliance with ADA and Section 504. The interactive process is the foundation of service provision, and the timely, equitable access to accommodations. Therefore, updating the process for student engagement, case management documentation, and communications is necessary for adherence to operational best practices and compliance.

The intended outcome of these proposed changes is to ensure greater integrity and consistency behind accommodation determinations and responsible stewardship of institutional resources.

B. Background

Using your discovery, you will explain the “why” - what is the context that makes this project necessary and important.

Currently, the Access Coordinator team does not have a standardized, documented method of reviewing and determining reasonable accommodations. This has created challenges and inconsistencies in services, communication, policy implementation for students, staff, and faculty.

In a potential legal investigation by the Office of Civil Rights (OCR), having a consistent decision-making process that is clearly documented is critical to demonstrate a good faith effort was made in the interactive process. Moreover, the Association on Higher Education and Disability (AHEAD) advises a documented review process as best practice. In short, these changes not only improve equitable access for students, they reduce institutional risk and foster scalable institution-wide collaboration.

The What

C. Scope & Deliverables

Deliverables – what is included in this project, as well as explicitly naming anything that is not going to be included. Sets the parameters of the project. Names the “must haves” vs the “nice to haves” vs “not included.” Name what “complete” means for this project.

D. Within-Scope

- Internal SOPs
- Templated standardized communication
- Staff Training – new process
- Stakeholder training/internal to the institution (counseling office, faculty, reslife)
- Internal documentation (of the decision making process)
- Definition, scope, implementation policies for each accommodation
- Website update – new processes/policies
- Creation of an appeals process and committee
- Public facing FAQs document
- Stakeholder/proactive change management of expectations to students
- Improved student registration form
- Health care provider disability disclosure form

E. Outside-of-Scope

- Updates to case management system and/or changing case management technology
- Full review of all previously approved accommodations; students prior to change will be “grandfathered in”
- Addressing processes or workflow of other departments implementing accommodations; will collaborate but will not lead

F. Goals

The intended outcomes. Whereas scope addresses the tangible deliverables, goals address the change outcome, or the impact of the project. Think about how you will measure the success. Include what “complete” means for this project.

This project will be considered complete when all of the above, resources, processes, and policies (Section C) are documented and implemented by Disability Services

G. Internal Goals:

- Consistency of interactive process and documentation of the decision making process
- Standardized policies, procedures, and protocols creating more efficient and effective workflow for disability staff
- Equitable service of accommodations to students

H. External Goals:

- Addressing the undue burden on the institution
- Clarifying for external stakeholders the accommodation language and definitions, which helped with adherence to accommodation implementation
- Disability documentation, standardized form to be utilized by providers

The How

I. Tasks & Responsibilities

What tools, resources, or commitments do you need to execute and complete this project. Think about people, process, and technology. What budgetary implications are there that might need approval?

J. RACI

- R = Responsible (does the work)
- A = Accountable (final decisions)
- C = Consulted (has input)
- I = Informed (kept apprised)

Processes

Tasks & Responsibilities	Director - DS	Assoc Dir. - DS	Information Tech (IT)	Data Coordinator	Access Coord. Team
Regular points of contact with internal staff (to review project, address questions/concerns, provide updates)	C	R/A	C	C	C
Regular meetings with project team on progress and/or challenges	A	R/A	C/I	C	C/I
Engagement with Legal regarding processes and documentation changes	R/A	C	I	I	I
Consideration for budgetary implications that may begin post-project completion	R/A	C	I	I	I

People

Tasks & Responsibilities	Director - DS	Assoc Dir. - DS	Information Tech (IT)	Data Coordinator	Access Coord. Team
Training opportunities and expectation management with staff	A	R/A	I	C	I

Technology

Tasks & Responsibilities	Director - DS	Assoc Dir. - DS	Information Tech (IT)	Data Coordinator	Access Coord. Team
Updating case management system (Clockwork)	A	A	R	A	C
SharePoint site development for testing and later implementation	A	R	C/I	R	C/I
Use of Microsoft Planner to track tasks throughout project and communicate updates	C	R/A	C	C	I

The Who

K. Stakeholders

The internal and external campus partners who may have an interest or will be impacted by this project.

L. Internal Stakeholders:

- Reception/Front Desk Clerk
- Learning Specialist Team
- Exam Proctoring
- Notetaking Coordination
- Physical Access team
- Outreach team
- Access Coordinators
- Leadership Team

M. External Stakeholders:

- UMass Legal Counsel
- Students
- Registrar
- Provost’s Office & Faculty
- Equal Opportunity and Access (EOA)
- Accessibility Advisory Committee (AAC)
- Center for Counseling and Psychological Health (CCPH)
- Dean of Students Office (DOSO)
- ResLife Assignments
- Accessible Van Services (AVS)
- Environmental Health & Safety (EH&S)

N. Project Team

Who are the players who will be assigned tasks to help bring this project to completion.

Name	Department Role	Contact	Project Role
NAME	Associate Director of Operations	###	Project Manager
NAME	Director of Disability Services	###	Project Sponsor
NAME	Director of I.T.	###	Clockwork Support
NAME	Data & Communications Coordinator	###	External communication & data report development

The When

O. Milestones & Estimated Timelines

Timeframe to complete the steps within the project. Milestones are the deliverable products that build up to the project completion.

Milestones	Estimated Start Date	Estimated Completion Date
Approval of project plan by Director and relevant stakeholders	September 2023	October 2023
Development of internal SOP documents	October 2023	November 2023
Revision of policies and website content to match new process	October 2023	December 2023
Development of internal SharePoint site structure	October 2023	December 2023
Development of Disability Disclosure Form (DDF) and approval by Legal Counsel	November 2023	December 2023
External communication to students and community partners	November 2023	January 2024
Back-end Clockwork edits (e.g., renaming accommodations, adding new accommodations, adding new fields to entering case notes, etc.)	November 2023	January 2024
Revise and publish new online student registration form in Clockwork	December 2023	January 2024
Development of internal staff training materials	December 2023	January 2024
Delivery of staff training and process launch	January 2024	January 2024
Go-live with student-facing interactive process		February 2024

Project Terminology & References

Term or Related Resource	Definition or Resource Link
SOP	Standard Operating Procedure A Basic Guide to Writing Effective Standard Operating Procedures (SOPs)
DDF	Disability Disclosure Form (fillable PDF)
AHEAD Documentation Guidelines	Supporting Accommodation Requests: Guidance on Documentation Practices - AHEAD - Association on Higher Education And Disability
AHEAD White Papers on Case Note Documentation	2019_AHEAD_White_Paper_FINAL.pdf
1-1 Supervision Template	
SWOR Analysis	Strengths, Weaknesses, Opportunities, and Risks (or Threats) SWOT: What Is It, How It Works, and How to Perform an Analysis
SharePoint file management	
Microsoft Planner	