KEEP Business Area Onboarding Policy

Contents

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1. Purpose

This policy defines the process for business areas seeking to onboard onto the **Knowledge Exchange and Engagement Platform (KEEP)** when they are not currently included in an active development phase. It ensures that access requests align with strategic priorities, available resources, and funding constraints.

2. Governance & Ownership

- **Research and Enterprise Services (RES) is the owner of KEEP**, with final authority over data access, funding, and system scope.
- The **KEEP Project Board** reviews onboarding requests and ensures alignment with strategic priorities.
- Funding considerations are a key part of decision-making, as RES licenses KEEP through HEIF funding, which may not extend to business areas outside RES.

3. What This Policy Covers

This policy applies when a business area requests:

- Full or partial adoption of KEEP for their processes.
- A change in scope to include them in future KEEP development phases.
- Integration with existing systems or data-sharing with KEEP.

This policy does NOT cover:

- Individual user access for teams already using KEEP (handled through the standard KEEP User Access Request Form).

4. Business Area Onboarding Request Process

To request onboarding, a business area must:

1. **Complete the** KEEP Business Area Onboarding Request Form
2. **Justify the request**, explaining their needs, current systems, and expected benefits.
3. **Confirm the budget** for any required costs of onboarding and ongoing support.
4. **Acknowledge that access is not guaranteed** and that integration must align with strategic priorities.
5. **Submit the form for review by the KEEP Project Board**, with final decisions on data-sharing and funding made by RES.

5. Evaluation Criteria

Requests will be assessed based on:

- **Strategic Alignment:** Does the business area's request fit within KEEP's intended scope and purpose?
- **Existing Development Roadmap:** Is the request already planned, or does it require additional scoping?
- **Resource Availability:** Can the KEEP team support the request without disrupting priority work?
- **Funding & Licensing:**
    - If RES/HEIF funding does not cover the request, does the business area have its own funding?
    - Can additional licenses be accommodated within the existing budget?
- **Data Ownership & Compliance:** Does the request involve data-sharing that requires RES approval?
- **Business Impact & Feasibility:** What are the implications of approving or rejecting the request?

6. Decision & Next Steps

- If approved, the business area will receive a timeline for onboarding and a funding agreement (if applicable).
- If out of scope for the current phase, the request may be deferred for future review, with a timeline for reconsideration.
- If rejected, the team will receive an explanation and guidance on alternative solutions.

7. Funding & Cost Considerations

- RES currently funds KEEP licenses through HEIF for teams under its remit.
- Business areas outside RES must either:
  - Provide their own funding for licenses, onboarding, and support costs.
  - Justify why KEEP should be centrally funded for their needs.
- Any requests with external funding dependencies will be subject to **separate approval** before onboarding.

8. Interim Measures for Deferred Requests

If KEEP onboarding cannot be provided immediately, alternative options may include:

- Continuing to use existing systems with periodic review for future KEEP integration.
- Limited access (e.g., reporting-only or controlled user roles).
- Exploring data interoperability between KEEP and their existing tools.

KEEP Business Area Onboarding Decision Tree

Step 1: Request Submission

⬇️ Business area submits the **KEEP Business Area Onboarding Request Form**.

Step 2: Eligibility Check

✅ **Does the request align with KEEP's scope and purpose?**

- **Yes** → Proceed to Evaluation.
- **No** → Reject request with explanation.

Step 3: Evaluation

✅ **Is onboarding already planned in the current development phase?**

- **Yes** → Approve and schedule onboarding.
- **No** → Proceed to next step.

✅ **Is there capacity to onboard this request without disrupting priority work?**

- **Yes** → Approve and integrate into the work plan.
- **No** → Proceed to next step.

✅ **Is funding available?**

- **RES/HEIF covers costs** → Proceed with approval.
- **External funding confirmed** → Proceed with approval.
- **No funding available** → Defer or reject request.

✅ **Is the request critical, requiring immediate access?**

- **Yes** → Discuss phased onboarding or minimal viable access.
- **No** → Defer to future roadmap and provide alternative solution.

Step 4: Final Decision

- **Approved** → Communicate timeline, funding agreement, and onboarding plan.
- **Deferred** → Schedule for future phase and provide interim solutions.
- **Rejected** → Provide clear rationale and alternative recommendations.