Business Case [Guidance]

Proposal Name:	Organizational Sponsor:	Date Submitted:
Customer/s Affected:	Project Requestor:	Prepared by:

INTRODUCTION

A business case is a high-level description that aids governance bodies, advisory councils, and/or OIT leadership in approving and planning work. Use this document as part of your business planning activities. Note: This document is neither the final description of customer requirements nor the final budget quote.

DO NOT CHANGE THE ORDER OF THIS BUSINESS CASE

SECTION 1 – Project Description

DESCRIPTION	*Provide a high-level summary of the project that can be easily understood by any member of the Emory Community.*
Describe the projects at a high level. Be sure to use terminology that can be understood by anyone at Emory. Be sure to spell out any acronyms and define any technical terms that may not be understood by all readers of this business case.	
PROBLEM STATEMENT	*What are the problems, issues, and/or opportunities that will be addressed by this proposal? Attach any available documents/diagrams about the current state.*
Describe the problems and/or opportunities to be addressed by this proposal. Why do we want to do this project? What is the justification for this project? If you have any documents, research, process models, or diagrams that describe the current state, be sure to attach them to this business case. Where possible, quantify the issues with the current state.	
SOLUTION	*What will this project produce? What products, processes, and/or services? Attach any available documents/diagrams about the future state.*
Describe the products, processes, and/or services this project will produce. If you have any documents, process models, or diagrams that describe the proposed future state, attach them to this business case. If any quantifiable measurements have been identified for the solution, include them in the Value Statement section below.	
SCOPE & DURATION	*What work needs to be done to deliver the solution? What are the areas of impact for this project? What areas are not in scope for this project?*
Describe the work to be done to deliver the solution. Include the deliverable to be produced by this project and the areas that will be impacted by this project. As needed, include any areas that are out of scope.	
Provide an estimated project duration.	
COORDINATION WITH OTHER AREAS	*To help ensure other areas are aware of the project, particularly when there is a resource requirement, please help us to identify any potential impact your project may have.*
___ Will your solution be considered the authoritative source for any data used across the enterprise? ___ Could other areas of the university benefit from or be impacted by your solution? ___ Does your solution involve a new product or service? ____ If so, has it gone through a security review? If you need to initiate a review, please fill out the Security Review Process Intake Document in ServiceNow.	

Will your solution require the use of any of these services by members of the community: ___ Enterprise data warehouse or integration with existing EBI warehouse data to enhance reporting and/or analytics ___ Any type of data integration (extracts and uploads, APIs, etc.) ___ Shibboleth or using an Emory username and password to authenticate ___ Require a modification to the enterprise IT infrastructure, such as networking, data, or an enterprise class system, such as OPUS, PeopleSoft HR, or Compass	Will your solution be accessed by individuals working at: ___ Atlanta VA Medical Center ___ Children's Healthcare of Atlanta ___ Emory Healthcare ___ Grady Healthcare of Atlanta

VALUE STATEMENT	*What value will this project bring? What are the benefits of this project? How will we know that this project has been successful? What are the measurable/quantifiable goals relating to key processes, products, resources, and/or services?*
Describe the value this project will bring. Will this project reduce costs and/or time? Will this project lead to more efficient processes? Will this project improve data quality? Include solution performance measurements, metrics, and/or measurable quantifiable goals that can be used to determine that the project has been successful.	

MISSION	**To create, preserve, teach, and apply knowledge in the service of humanity.** *Describe how the work you will be doing supports Emory's Mission. Indicate which mission this project will support: Foundation, Clinical/ Service, Education, Research.*
Refer to the Emory Mission statement, as well as the mission of the sponsoring organization to describe how this project will support the Mission.	

ALTERNATIVES	*What alternative options have you considered? Include the option/impact of not implementing the project at all and at least one alternative. State the reasons for not selecting each alternative.*
Alternative Option	**Reason for Not Selecting Alternative**
Status Quo	Describe briefly why the current state was not selected as an option.

RISKS AND CONSTRAINTS	
RISKS	*Risks are events that may occur and require active management to mitigate their impact. What are the risks for this project? How would you rate them for their probability of occurring (High/Medium/Low), and their potential impact (High/Medium/Low)? Include any strategies you have identified for risk mitigation and identify any external dependencies.*
Describe any risks associated with this project. Include the probability of occurring (high, medium, low) and the risk of occurring (high, medium, low). Include any strategies you may have identified for risk mitigation.	
CONSTRAINTS	*What limitations or constraints affect the proposed project? These generally involve technology, budget issues, scheduling, regulatory timelines, dependencies, or business processes. Constraints are absolutely true (100% accuracy) and cannot be changed by the project.*
Describe any limitations/assumptions or constraints on the proposed project. Constraints are true facts that cannot be changed by this project and that might restrict the project. These include business constraints (such as scheduling, funding, resources) and technical constraints (such as development languages, hardware, infrastructure, software to be used in the solution). Limitations/assumptions includes circumstances and events that are accepted to be true without proof or demonstration. At the time of preparing the business case It is important to document any constraints and limitations/assumptions that have been identified. Assumptions can impact the project lifecycle and resulting solution. This information can be used to identify potential risks.	

Be sure to review the resource hours with the teams that will provide the resources.

SECTION 2 – Project Resources: Consult with OIT, including PMO, & Procurement as needed				
RESOURCE REQUIREMENTS	*What resources does this project need? Add/change resources as needed. Estimate (plus/minus 50%) the level of effort. In addition, indicate the ongoing support requirements, including potential offsets.*			
Roles for Project Time & Maintenance	**One-Time OIT Hours**	**One-Time Non-OIT Hours**	**Annual OIT Hours**	**Annual Non-OIT Hours**

Functional SME/Internal Stakeholders				
Project Manager (**typically 20% for the duration of the project**)				
Business Analyst				
Middleware				
Developer/Testing				
Network Infrastructure				
System Administration				
Customer / Non-OIT Resources				
Service Management Office				
Add other rows as needed				
Total Hours =				

COSTS	In this section, estimate (plus/minus 20%) the cost of the proposed project.
	1. **One-Time/Never to Repeat Costs**: Initial deployment and/or stand-up costs such as professional services, consultants, implementation services, hardware, travel, training, vehicles, and one-time licensing costs for software.
	2. **Annual Recurring/Post Project Operating Costs:** Ongoing costs such salary/fringe for new FTEs, utilities (dial tone, cellular, data, wireless, gas, electricity, water), other rental costs, recurring cloud software licensing, software and/or hardware maintenance, Virtual Machines (VMs) disk storage.
	3. **Annual Life-Cycle Renewal Costs:** Think of this as a 'savings' account to replace any of the one-time costs that don't last forever. For example, this is 1/4th of the physical hardware purchased (not Virtual Machines) or ¼ of software upgrades (if not part of software maintenance) or 1/4th of professional services to implement the next upgrade or 1/8th of a vehicle estimated to last for eight years. Divide the estimated renewal costs by the number of years until a refresh is needed.

Description of Item	One-Time/ Never-to-Repeat Costs	Annual Recurring/Post-Project Operating Costs	Annual Life-Cycle Renewal Costs
Total Cost of All Items			

Provide Speedtype (if available) for Each Column			

EXPECTED FUNDING	What are the funding strategies for this project if this business case turns into a project? Indicate if net new funds will need to be requested or if funds have been allocated through the normal budget cycle to fund this project.

SAVINGS	How much is this project expected to save (time, money)?

SECTION 3 – Business Case Contributors List all contributors in this section, including the name(s) from the first page.

The following individuals provided input and/or a review of this Business Case:

NAME	DEPARTMENT/GROUP	TITLE/ROLE

EMORY UNIVERSITY | Office of Information Technology

SECTION 4 – Approvals List all of the approvers in this section. Obtain their approval on paper or electronically.

By signing the Business Case you are in agreement with the preliminary estimates for duration, scope, anticipated costs, and the project analysis as described herein. All signatories to this agreement acknowledge that actual costs and duration will be different from the preliminary estimate.

NAME	SIGNATURE	DATE
Primary Service Owner		
Customer Name		
Joanna Green, for any OIT business case over $100K		