# Business Case

## [Project Name]

### TAC 216 Companion Guide Version: [Version]

### Date Prepared: [Date]

### Prepared by: [Name, email, phone]

By authorizing this Business Case the Project Sponsor and CFO agree to budget and funding source(s).

| **Approver Name** | **Approver Title** | **Signature** | **Date** |
| --- | --- | --- | --- |
|  |  |  |  |
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**Note to the Author**

Use this template to help you write a Business Case. The template includes instructions to the author, boilerplate text, and fields that should be replaced with specific project values.

**Blue** text enclosed in angle brackets (<text>) either provides instructions to the document author, or describes the intent, assumptions, and context for content included in this document. **Delete the blue text** as you fill out the Business Case sections.

**Brown** text enclosed in square brackets ([text]) indicates an example. **Replace the brown text** as you fill out the Business Case sections.

Some sections of this document overlap with sections suggested on the Project Request template. If both templates are used, decide if you want project managers to fill out the sections in both documents.

Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.

**Please delete this page before signing the Business Case.**

#### Section 1: Project Overview

##### Business Need

< What do the sponsor, stakeholders and organization want this project to accomplish? What is the primary need that this project will address? Is this project a simple “nice to have”, or does it fill some sort of critical business need? This section is also on the Project Request.>

##### Project Summary

<Provide a brief summary of the recommended / requested project. Include a high-level description of the business scope. This section is also on the Project Request.>

##### Business Goals/Objectives

<Define the business goals and objectives that will be met by this project. This section is also on the Project Request.>

| # | Business Goal/Objective | Description |
| --- | --- | --- |
| [BC-1] |  |  |
| [BC-2] |  |  |
| [BC-3] |  |  |
| [BC 4] |  |  |
|  |  |  |

<If a Project Request was submitted, match the Business Case business goal/objective # with the project request business goal/objective #.>

##### Business Value

<What is the value to the institution/agency and/or its customer(s)? What cost savings, efficiency gains or business improvements are expected as an outcome of this project? Does the project have a quantifiable Return on Investment (ROI)? This section is also on the Project Request.>

##### Justification and Impact

<Justify why the recommended project should be implemented. Include the impact of not implementing the project. Will service to stakeholders be impacted? What other services/products may be affected? This section is also on the Project Request >

##### Stakeholders

<Explain who the stakeholder(s) is/are. Are they faculty, staff, students, TAMUS, external partners, other services, etc.?>

|  |  |  |
| --- | --- | --- |
| **Stakeholder Role** | **Stakeholder Name(s)** | **Stakeholder Title** |
|  |  |  |
|  |  |  |
|  |  |  |

##### Projected Project Budget and Funding Source(s)

<Identify the funding amount and source (e.g., state funds, local funds, PUF funds, capital budget, rider authority, appropriated receipts) of project funds. The project budget represents the amount of funds allocated to the project to complete the project objectives and cover project costs. If unavailable at this time list ‘Not Available’. >

| # | Amount | Source |
| --- | --- | --- |
| [1] | [Some Dollar Amount] | [grant; budget line item] |
|  |  |  |
|  |  |  |
|  |  |  |

##### Assumptions

<Assumptions are people, resources, or behaviors you believe will be available during the project. List known or anticipated assumptions.>

* [IT support staff will be available to work with the functional users and the vendor to complete implementation by the requested timeframe.]

##### Constraints

<List known or anticipated constraints impacting the project. Constraints place limits on the project, usually to project milestones, cost, or quality.>

* [A process needs to be identified and approved by Banner Governance to place a registration hold for students that have not completed mandatory training.]

##### Dependencies

<Insert the schedule/project dependencies (both internal and external). Impacts can occur to schedule, cost, or quality.>

* [Professional services vendors must be sourced and contracts signed.]

##### Risks

<Risks are uncertain events or conditions that can positively or negatively impact the project if they occur. List known or anticipated risks. Include what you will do if the risk occurs.>

* [If we are unable to implement prior to Fall 2017 semester, we will need to continue the current program until the implementation can be completed.]

#### Section 2: Project Evaluation

##### Alignment

<Check all the criterion that apply.>

| **Category** | **Criterion** | **Description** | **Project includes criterion** |
| --- | --- | --- | --- |
| Strategic Alignment | *System Alignment* | Project meets or supports an A&M System strategic goal, initiative or directive**. If yes, indicate the goal, initiative or directive here:** | ☐ |
| Strategic Alignment | *Institution or Agency Alignment* | Project meets or supports an institution and/or agency goal. **If yes, indicate the goal, initiative or directive here:** | ☐ |
| Compliance | *Legislative*  | Project implements new state/federal requirements or new legislation. **If yes, provide the mandate related to the project and the statutory citation here:**  | ☐ |
| Compliance | *System Policy* | Project implements A&M System requirements or a new policy. **If yes, provide the mandate related to the project and the policy citation here:** | ☐ |
| Compliance | *Member Rule or Procedure* | Project implements institution/agency requirements; a new rule or procedure. **If yes, provide the mandate related to the project and the rule or procedure citation here:** | ☐ |
| Risk Remediation | *Security* | Project remediates a security risk/issue. | ☐ |
| Risk Remediation | *Audit* | Project remediates audit findings. | ☐ |
| Risk Remediation | *Technology* | Project replaces aged technology | ☐ |

##### Institution/Agency Priority

<Choose the importance of this project to your division or area.>

☐ High

☐ Medium

☐ Low

#### Section 3: Decision

<Include additional information about the project and indicate the approvers’ overall decision on whether the project moves forward.>

##### Project Manager Involvement

<Please choose one of the Project Manager roles listed below in accordance with the anticipated project structure and complexity and your organization’s policies.>

☐ Lead Project Manager (internal project manager is responsible for the project)

☐ Oversight Project Manager (project manager provides regulatory/best practices supervision)

☐ Consultant Project Manager (external project manager/vendor is responsible for the project)

☐ Other (explain)

##### Project Complexity and Risk Assessment Score

[ ]  Level 1 (26 – 50)

[ ]  Level 2 (51 – 75)

[ ]  Level 3 (76 – 100, but no Level 4 factors)

[ ]  Level 4 (> 100 or one or more Level 4 factors)

#### This project has assessed as a Level [#] project with a score of [#]. If approved, it will be managed by [project manager or project coordinator name], [project manager or project coordinator title].

Decision Date (if different from the Date Prepared on page 1):

☐ Approved to proceed

☐ Deferred

☐ Rejected

<Provide a brief explanation of Deferred and Rejected decisions.>