PROJECT INFORMATION

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| **Project Name** | **Project ID** | **Project Manager** |
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| **Business Process Owner** | **Project Sponsor** | **Project Executive Sponsor** |
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OVERVIEW

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| Project Goal: The long-term objective that the project purpose will contribute to. |
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| Project Purpose: The near-term objective that the project will achieve if all the output objectives are completed as planned and assumptions remain true. |
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| Product/Project Description: Document the characteristics of the product/project. This will be refined during the Planning Process. |
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| Will the project require procurements? (i.e. Statement of Work, Addendum to a Master Agreement, RFI, RFQ or RFP) |
| [ ]  Yes [ ]  No [ ]  Unknown If yes, which procurement type is required?[ ]  SOW [ ]  ADMA [ ]  RFI [ ]  RFQ [ ]  RFP  |

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| Identify any related or impacted Systems, Programs and/or Projects that may be affected by this project |
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| Project Terms and Definitions |
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**BUSINESS CASE & VALUE ANALYSIS**

*The following sections documents the “current” and “future” business situation to provide a view of the expected benefits of the project and its drivers in order to justify further project management activities.*

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| Current Situation: *Important Historical Background and “as-is” situation* |
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| Business Value: *Describe the improved situation that would make this initiative worthwhile (expected benefits) and how much you are willing to invest to obtain the future state (expected cost to complete)* |
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| Strategic Alignment: *Describe the specific organizational goals that this project is aligned to and will support* |
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| Drivers: *Items driving the project to be completed (i.e. a regulatory requirement, a legislative mandate, failing hardware, etc.)* |
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| Assumptions: *Items that must be true in order for the project to be successful* |
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| Constraints*: Items beyond the control of the team that limits options* |
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| Risk Assessment: *Please describe the high level risk factors and mitigation strategies for each, both negative and positive.* |
| * Business/economic:
* Organizational:
* Technological:
* Execution/implementation:
* Complexity:
* Operational:
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| Cost of not doing this project: *If the project is not selected to move forward into planning, what will be the organizational “cost” (risks to people – constituents, employees, community, process – the way things are currently done, and/or technology)* |
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| How will out-years be funded? |
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| Will additional internal positions be required during and/or after the project? Please identify impacts, duration. |
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| What happens if funding stops for this project in the out years? |
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PROJECT OBJECTIVES

*Objectives should be “SMART”: Specific, Measurable, Achievable, Relevant, and Time-bound*

| Objectives | Deliverables |
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| High Level Scope:  |
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| **Out of Scope:** *What is outside the scope of this project* |
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| Quality Metrics: *Describe the means by which the project’s success will be reported & measured at this initial point in time* |
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| High Level Milestones and Timeline: *List the key milestones (only those known at this early stage) needed to plan and execute the project*  |
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| Procurement and/or acquisition strategy:  |
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| **Resource Requirements** |
| **Estimated Resource Requirements***In addition to the human component, what other resources will be needed for satisfactory completion of the project? Provide a list of computer equipment, raw materials, working space, and any other resources that might be taxed during the project's life cycle. If certain resources will only be needed during specific phases of the project, make note of that as well.* |
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ALTERNATIVES ANALYSIS

*This section documents any alternative solutions considered to satisfy the requirements.*

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| Description of Alternatives, including Status Quo (if applicable). Examples may include: |
| * Status Quo
* On-Premise
* Cloud
* Replace
* Upgrade
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**COSTS**

*For each feasible Alternative (including the Status Quo), provide life-cycle cost estimates for initial and on-going costs. Repeat as necessary.*

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| ALTERNATIVE: |
|  | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Total | Annual O&M |
| Hardware Costs |  |  |  |  |  |  |  |
| Software Costs |  |  |  |  |  |  |  |
| Services Costs |  |  |  |  |  |  |  |
| Internal Labor Costs |  |  |  |  |  |  |  |
| Training Costs |  |  |  |  |  |  |  |
| Infrastructure Costs |  |  |  |  |  |  |  |
| Communications Costs |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |
| Total Costs |  |  |  |  |  |  |  |

**BENEFITS**

*For each feasible Alternative (including the Status Quo), provide life-cycle benefit estimates. If benefit can be quantified, enter estimated dollar amount/impact. Repeat as necessary. Examples include:*

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| ALTERNATIVE: |
|  | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Total | Annual Recurring |
| Increased employee productivity |  |  |  |  |  |  |  |
| Increased processing times |  |  |  |  |  |  |  |
| Reduced labor costs |  |  |  |  |  |  |  |
| Avoidance of fines, penalties |  |  |  |  |  |  |  |
| Reduction in hardware, software, infrastructure costs |  |  |  |  |  |  |  |
| Increase scalability, flexibility |  |  |  |  |  |  |  |
| Better decision-making, best practices |  |  |  |  |  |  |  |
| Decrease in risk |  |  |  |  |  |  |  |
| Increase employee morale |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |
| Total Benefits |  |  |  |  |  |  |  |

**FINANCIAL ANALYSIS**

*For each feasible Alternative (including the Status Quo), provide financial performance indicators. Repeat for each Alternative considered.*

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| Alternative: |
| * **Total Cost of Ownership (TCO)** - the entire quantifiable, tangible cost to purchase, operate and support a solution over the 5 year period.

**TCO** = $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* **Return on Investment (ROI)** – the quantifiable, tangible benefits an enterprise will derive from a solution relative to its cost; expressed as: Benefits from an Alternative – TCO / TCO. ROI analysis can be used when benefits are measureable and directly attributable to the solution deployed, and have been endorsed by managers and executives.

**ROI** = \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_% |

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| **Project Authority** |
| **Approval Authority** |
| **Project Manager** |
| **Oversight Authority:** |

**Approval Information**

By signing this document you agree to this as the formal charter statement and business case, to begin work on the project described within and the commitment of the necessary resources (budget, personnel, etc.) to move the project to the next phase PLANNING.

Approvals Signature

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| ROLE | Name/Title | Department | Signature | Date |
| Business Process Owner |  |  |  |  |
| Project Sponsor |  |  |  |  |
| Executive Project Sponsor |  |  |  |  |
| Project Manager |  |  |  |  |