High Level Business Case

|  |  |  |  |
| --- | --- | --- | --- |
| **PPM #** | TBD | **Request Name** | [Make Sure Name is Customer Friendly] |
| **Date** | [Date first started to write] | **Author(s)** | [BRM Name] |

This document is intended to synthesize well-researched, analyzed information to support project selection. It allows for a consistent decision-making process determining whether a program/project is worth the investment.

# Project Purpose

[Use this section to write one to two sentences documenting the purpose of this project.]

# Problem or Opportunity Statement

[Use this section to write why this is happening and why it is important for UF to dedicate resources]

## UFIT Request Lifecycle

As part of **Business Case** phase of the UFIT Request Lifecycle, we are requesting resources for the *Plan* phase.

## Deliverables

The following is a listing of deliverables for this project:

* [Deliverable 1 – note other sections of HLBC refer to this list]
* [Deliverable 2]
* [Deliverable 3]

**Planning Time Requested to Scope:** [please note this is *only* place in HLBC where exact planning time is listed as other sections reference this line, include weeks and how many meetings per week, along with how long each meeting should be]
**Requested Go-Live Date:** [List date sponsors want project to go-live where constituents can interact. This is a guideline for project manager and project teams both planning and execute. If date cannot be determined until planning scope is defined, you can list “Date will be refined after planning.”]
**UFIT Strategic Plan Goal:** [Reference the list of UFIT Strategic Plan goals and choose one that best represents goals/deliverables of the project]

# Planning Deliverables

This HLBC is requesting planning time (see page 1) to develop detailed requirements and scope of work. The planning team listed below will list out what and who is needed for the Execute phase. The Execute stage would be scheduled to kickoff based on resource availability for all team members.

At the end of the PLAN phase, these will need to be completed by the Planning Team.

* Project Scope and Strategy
* Project Roles and Responsibilities
* Project Schedule
* Project Allocations

# Options Explored

If applicable, provide all the options explored to solve the problem or fulfill the opportunity. If possible, insert a link to the completed Needs Assessment for reference purposes.

* *Option 1* – [why was this chosen]
* *Option 2* – [why was this not chosen]
* *Option 3* – [why was this not chosen]
* *Option 4* – [why was this not chosen]

# Benefits

Benefits are the result of a request’s outputs and outcomes.

## Outputs:

List the products, services, or functionality to be delivered by this request.

* See “Deliverables” above (page 1)

## Outcomes:

List the functions that will be improved with the delivered outputs.

* [What will be improved?]

## Benefits:

List measurable improvements the University of Florida will experience as a result of the outcomes.

* [What are measurable improvements that the UF community experience?]
* [If you can, list how you will measure and when]

# Request Boundaries

List all known services, deliverables, and activities within the boundaries of this request.

* [add additional boundaries here – what is in scope?]
* See “Deliverables” (page 1) and “Outputs” (page 2)

# Risks to this Request and to the University

List any known risks to this request and/or University of Florida.

* Resource availability/constraints due to competing requests
* Unexpected University closures or changes in leadership
* [add additional Risks and Concerns here]

# Considerations

List known considerations for which the sponsors and approval teams should be aware.

* [What should the Sponsors be aware of?]
* [Does a UF risk assessment need to be completed? Add that here]

# Financial Costs

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| --- | --- | --- | --- |
| Description | Frequency | Amount ($) | Funding Department |
| [name of license, product] |  |  | [who will fund/pay] |
|  |  |  |  |

# Sponsor(s)

The sponsors have various decision-making responsibilities for a project and will also participate in various updates/approvals from the Plan, Execute, and Go-Live phases.

* *The* ***Executive Sponsor*** *has executive decision-making rights over the project’s scope and budget.*
* *The* ***Functional Sponsor*** *has functional decision-making authority and can commit the required financial and functional human resources to support this request.*
* *The* ***Technical Sponsor*** *is the UFIT executive/manager who has technical design decision-making authority and can commit the required technical human resources to support this request.*

|  |  |  |
| --- | --- | --- |
| Executive Sponsor | Functional Sponsor | Technical Sponsor |
|  |  |  |

# Team Members Needed for Planning

This HLBC covers the ***planning*** phase only. The team below will work to develop a Scope of Work (SOW). After the SOW is developed, the resources list will be checked for availability by the UFIT CERP Project Management team and a start date for the Execute phase of the project will be determined.

**Planning Commitment:** See Page 1 above

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Project Role | Team | Total |
| [List UFIT Project Mgr] | Project coordination | UFIT CERP |  |
| [List UFIT BRM] | Customer Guidance | UFIT CERP |  |
| [List all UFIT] |  |  |  |
| [List all Local IT] |  |  |  |
| [List all customers] |  |  |  |
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Total Hours: **XX hours per week for total hours of XX hours for the Planning Phase**

# Resource Estimates Reviewed By:

List every person who reviewed the above resource estimates prior to Gate 1 submission. These are normally the managers of the project team listed above.

**NOTE**: By signing here, you are agreeing to commit a resource for the estimated hours for planning this effort.

| Name | Title | Team | Date Reviewed |
| --- | --- | --- | --- |
| Pate Cantrell | IT Manager | UFIT CERP |  |
| [list managers of all project team members above so they can review] |  |  |  |
|  |  |  |  |
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# Document Contributors

List every person who contributed to the information provided within this document.

| Name | Organization | Description of Contribution |
| --- | --- | --- |
| [UFIT BRM who wrote] | UFIT | Created and edited document |
| [list any other contribs] | UFIT | Provided description, funding, direction |

# Document Reviewed By

List every person from UFIT and the customer side who reviewed this document prior to Gate 1 submission. For those reviewing, please add the date you reviewed.

| Name | Title | Team | Date Reviewed |
| --- | --- | --- | --- |
| [initially list all project team members and their managers as they will review] |  |  |  |
| [ add in others as needed ] |  |  |  |

# Customer Signoff for DocuSign

*This part of the process formalizes our agreement to move forward on the project details listed above.*

*List the customer names that need to sign off for initial project submission. The email listed is the official email address for person so that Shibboleth will work within DocuSign. This is normally the username that you login to MyUFL (listed as username@ufl.edu) and not the email address alias as some UF persons have email aliases.*

*For a project to get signoff, the following order will be followed:*

1. *UFIT CIO Senior Leadership Team (via DocuSign broadcast)*
2. *Group 1 below (via DocuSign broadcast if multiple people listed)*
3. *Group 2 below*
4. *UFIT CIO*

## Group 1

*This is the Functional Sponsor(s). If multiple persons are listed, this will be setup as a broadcast DocuSign request.*

| Name | GatorLink Email(GLID@ufl.edu) | Title | Organization |
| --- | --- | --- | --- |
|  |  |  |  |

## Group 2

*This is the Executive Sponsor.*

| Name | GatorLink Email(GLID@ufl.edu) | Title | Organization |
| --- | --- | --- | --- |
|  |  |  |  |