**Business Case Proposal Form**

A business case is a high-level description that aids governance bodies, advisory councils, and/or George Mason leadership in reviewing, approving, and prioritizing investments, initiatives, and other requests. This form should be completed with assistance from Mason’s Portfolio and Project Management Office (PPMO) and submitted to PMO@gmu.edu for review and inclusion in governance reviews.

***Note: This document is neither the final description of customer requirements nor the final budget quote.***

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| **SECTION 1 – GENERAL INFORMATION** |
| **REQUEST TITLE**  |  | **DATE** |  |
| **REQUEST / ORGANIZATIONAL SPONSOR** |  | **REQUESTING ACADEMIC OR BUSINESS UNIT** |  |
| **REQUESTOR’S DEPARTMENT** |  | **DEAN / VP / UNIT LEAD SIGNATURE** |  |
| **REQUESTOR’S PRIORITY** | *Select the relative importance of this effort to the requestor and/or sponsorLow = Nice to have but not necessarily needed right away, Medium = Necessary for business functions, High = Critical to the organization's success.*[ ]  High [ ] Medium [ ] Low |
| **SUBMITTER NAME**  |  | **SUBMITTER EMAIL(S)** |  |

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| **SECTION 2 – EXECUTIVE SUMMARY AND BACKGROUND** |
| **DESCRIPTION** *Provide a summary of the request that can be easily understood by any member of the George Mason community. It includes what is being requested and a description of what it will do/accomplish.  It may be something new, replacing something, or even retiring something that currently exists (or a combination)* |
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| **OVERALL FOCUS AREA**(C*hoose one*) | [ ] Instructional Focused [ ] Research Focused [ ] Administrative Focused[ ] Infrastructure Focused [ ] Facilities Focused [ ] Academic Support Focused |
| **TECHNOLOGY COMPONENT?** |  [ ]  Yes [ ] No  [ ] Unsure | If **Yes**, does it require developing custom software or applications? |  [ ]  Yes [ ] No  [ ] Unsure |
| **DOES YOUR REQUEST SATISFY ANY LEGAL / REGULATORY / STATUTORY REQUIREMENTS OR UNIVERSITY MANDATE?** |  [ ]  Yes [ ]  No | If **Yes**, describe the mandate. |  |
| **OBJECTIVE / PROBLEM STATEMENT***Please describe the problem, issue, or opportunity that this request seeks to solve or address, and any contextual background or history. What is the current process? What will your request accomplish? List key objectives.* |
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| **AUDIENCE***Who is the audience? Who will benefit from this request (students, faculty, staff, external constituents etc.), and how will they benefit? If possible, please provide a numerical estimation of how much of the population will be interacting with the solution.* |
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| **VALUE STATEMENT** *What potential value will this request bring (e.g., financial, service, functionality)? What are the benefits of this request? Benefits may be financial (e.g., increased tuition or revenues, reduced costs, improved margins, etc.) or non-financial (e.g., reduced risk, enhanced reputation, increased efficiency, enhanced student/staff experience, etc.).*  |
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| **RISKS***Specify any risks to the University (compliance, financial, operational, strategic) that may be encountered if the problem is not addressed.* |
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| **MASON STRATEGIC PLAN ALIGNMENT***If this request relates to Mason's Strategic Plan, state the relevant Mason Goals to which the request directly aligns or supports. Information on Mason's Strategic Plan and goals is found at:* [*http://strategicplan.gmu.edu/*](http://strategicplan.gmu.edu/)*Upon selecting the Strategic Plan or goal alignment(s), provide additional details/explanation of the alignment.* |
| **Strategic Goal** | **Primary Goal (Y/N)** | **Alignment to Strategic Goal** |
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| **SECTION 3 – SOLUTIONS OVERVIEW** |
| **POTENTIAL SOLUTIONS***Describe the potential solutions identified, the preference for each solution, and provide any known details of that solution. Include at least one alternative.* |
| **Potential Solution** | **Preferred Option (Y/N)** | **Description – details about the solution and why or why not it may be the preferred option. Also include the option/impact of not implementing the request at all (status quo).** |
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| **SCOPE***What work needs to be done to deliver the solution? What are the areas of impact for this request? What areas are not in scope for this request?* |
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| **DEPENDENCIES***Describe any major dependencies between your request and other initiatives. Dependencies are logical relationships between two or more activities that may impact the timeline. Describe how this request will interact with current and planned operations or initiatives where there are no dependencies. Discuss how it will support and/or be supported by those activities.* |
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| **ANY SIMILAR, EXISTING MASON SOLUTIONS?***Are there any tools, processes, resources (e.g., software, tools, solutions, etc.) currently in place at Mason that are similar to those that this request will create? Explain your process for identifying such resources and how this request would add to them and not duplicate them.* |
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| **SUCCESS CRITERIA***How will we know that this request has been successful? What are the measurable/quantifiable factors or standards that will indicate success? Describe in narrative form how the request’s success will be evaluated. Quantitative targets, when known, may be entered into the chart below.* |
| **Metric or Value** | **Baseline** | **Target** |
| *Ex: Hours between receipt of customer e-mails and initial reply sent back to customer* | *Ex. Current response time is 30 hours* | *Ex. Reduce initial response time to customer e-mails to under 24 hours* |
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| **GOAL / DELIVERABLES***What will this request produce? What products, processes, and/or services? Attach any available documents/diagrams about the future state. What are the major anticipated deliverables from your request? These are products developed by the request (e.g., servers installed, network changes, application admin tasks, account creation, security roles, system configurations, authentication needs, etc.).*  |
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| **SECTION 4 – ANTICIPATED COSTS AND RESOURCES** |
| **IS FUNDING CURRENTLY AVAILABLE FOR THIS REQUEST IDEA OR WILL NET NEW FUNDS NEED TO BE REQUESTED?** Check one or more options. | [ ]  Existing Funding [ ]  Net New Funding / Additional Funding [ ]  Unsure [ ]  None Needed |
| If existing funding exists, please provide the allocated capital and operating funding amounts for this request. |  |
| **RESOURCE REQUIREMENTS***What known or anticipated resources (such as hardware, software licensing, equipment, etc.) does this request need? Add/change resources as needed. Estimate (plus/minus 50%) the level of effort. In addition, indicate the ongoing support requirements, including potential offsets.* |
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| **MASON STAFF***What are the known or anticipated high-level Mason staffing resource requirements? What entities from the University will be involved? What is the current status of staff resources?* |
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| **OTHER STAKEHOLDERS***Are there any other known or anticipated stakeholders (external/third-party) that will be engaged in this endeavor, both for planning and execution? How are they involved – what is the connection?* |
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| **COSTS***What are the high-level estimated procurement costs (software costs, external consultants, equipment and supplies, travel, etc.)? What are the estimated Mason labor requirements? Differentiate between procurement costs and internal Mason costs. Differentiate between new/marginal funding and ongoing/maintenance funding needs. Use the chart to articulate costs.* **The Internal Labor cost section is to be completed using the Project Estimation Tool found on the PPMO Templates page of the ITS Website at** [**https://its.gmu.edu/portfolio-and-project-management-templates/**](https://its.gmu.edu/portfolio-and-project-management-templates/)**. The costs figures listed in this section are not the final budget quote but serve as estimations of how much funding the request will need to be completed – these are rough order of magnitude (ROM) estimates.**In this section, estimate (plus/minus 20%) the cost of the proposed request. 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 Request Operating Costs:** Ongoing costs such as 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 1/4th 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.]

**If providing estimates for different approaches/options, this table can be repeated to show potential differences.** |
| **Description of Item** | **Cost Category** | **One-Time/****Never-to-Repeat Costs** | **Annual****Recurring/Post-Request****Operating Costs** | **Annual Life-Cycle Renewal Costs** |
| **Procurement Costs** |
|  | Choose a Cost Category. | $0.00 | $0.00 | $0.00 |
|  | Choose a Cost Category. | $0.00 | $0.00 | $0.00 |
|  | Choose a Cost Category. | $0.00 | $0.00 | $0.00 |
|  | Choose a Cost Category. | $0.00 | $0.00 | $0.00 |
| **Total Procurement Costs** | **$0.00** | **$0.00** | **$0.00** |
| **Internal Labor Costs** |
|  | Choose a Cost Category. | $0.00 | $0.00 | $0.00 |
|  | Choose a Cost Category. | $0.00 | $0.00 | $0.00 |
|  | Choose a Cost Category. | $0.00 | $0.00 | $0.00 |
|  | Choose a Cost Category. | $0.00 | $0.00 | $0.00 |
| **Total Internal Labor Costs** | **$0.00** | **$0.00** | **$0.00** |
| **ESTIMATED SAVINGS***Are there cost savings that the request can provide? How will this initiative save money, time, or resources? Please describe below how this request will provide cost savings for your team, business unit, or the Mason community as a whole. Additionally, please provide any specific examples of potential cost savings in the table below.* |
| **Cost Savings Rationale** |  |
| **Cost Description** | **Current Costs** | **Target Costs** |
| *Ex: Decreased annual server hosting costs* | *Ex. Current annual hosting costs - $7,000* | *Ex. Target annual hosting costs - $4,000* |
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| **Total Costs** |  |  |
| **Total Savings (Current Costs minus Target Costs)** |  |
| **CONSTRAINTS***What are the key constraints? (Request constraints are limitations under which a request must be completed. Constraint categories can include scope, schedule, budget, quality, resources, and environment.)* |
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| **SECTION 5 – ADDITIONAL INFORMATION** |
| **ADDITIONAL INFORMATION / ATTACHMENTS***Please provide any additional information, files, attachments, or documents that may be relevant to your request or helpful to Mason leadership in their review.* |
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| **FOR INTERNAL PPMO USE ONLY** |
| **PROJECT ID** |  |
| **PPMO ANALYST** |  |