IT Investment Proposal form

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Please replace the sample Latin with the contents of your submission

# Proposal Title

Instructions: The Investment Proposal form is the first stage of a IT project. Any significant piece of work (defined as more than 20 days IST effort, more than $20,000 of costs or that touches our core network) is reviewed through the university IT Governance process. This form will communicate the high-level concept for the project to the committees and will be reviewed and approved during the governance process. It does not need to be detailed, but should give enough information that the committees understand the outcomes and impact of what is being proposed.

The process:

1. Complete Part 1 and 2 of the form and submit it to servicedesk@umanitoba.ca with a Subject Line of “IT Investment Form”.
2. IST will contact the Review Contact within a week to discuss part 3
3. Committees meet quarterly in advance of the University IT Advisory Council (UITAC). You may be asked to present your proposal to a committee.
4. After UITAC meets you will be contacted regarding approval to proceed. If your project requires project management from IST, a Project Manager will be assigned and the project will be initiated.

If you have any questions please contact Terry Bunio at terry.bunio@umanitoba.ca or 474-9298. We regularly help people navigate this process.

\*\* This help text is marked as **hidden text**. You can hide this by clicking on the ¶ in the Home Ribbon or by simply deleting it.

|  |  |  |  |
| --- | --- | --- | --- |
| Submitted By | **Your Name** | Date  | **Submit Date** |
| Authorized By | **Approver Name** | Faculty/Unit | **Faculty Name** |
| Review Contact | **Who should IST contact to discuss this with.**  | Department Name | **Department Name** |
| Technical Review by | **Who in IST Reviewed** |  |  |

# Part 1: Executive Summary

What is being proposed, the costs and benefits. [250 Words]

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# Part 2: Proposal Narrative

## Problem, Need & Impact

Describe the problem or need that is being addressed and the impact to the University community. Consider things like why it is needed now; what is changing and what is not changing; how people’s life or experience of the institution will be different; what success looks like. It may be helpful think about the question “wouldn’t it be great if…”. [200 Words]

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## Alignment to Strategic Plan

How does this enable the University, department or unit strategic plans? How specifically will it fulfill or enable any departmental or unit mandate? [1-3 sentences]

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## Constraints

What do we need to organize this project around. What will help focus the delivery and creativity. Things like critical dates, availability, money, regulations, things that must (or must not) change. [3-5 bullets].

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## Consequence of Not Proceeding

Add a description of what happens if this initiative is not pursued. What opportunities are missed? Impact on future projects? What services are impacted? Etc. [100 words]

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# Part 3: Assessment

To be completed with Information Services and Technology representative.

This section will be completed in conversation with IST. IST will contact you to discuss aspects of your proposal to provide some guidance to decision makers around areas like technical feasibility, risk, and cost. Don’t worry, it is relatively painless. You should be contacted within 1-2 business days.

## Technical Commentary

Technical comments provided by IST about the feasibility of the proposal, any high level architectural considerations, and any obvious technical risks or benefits. (100 words)

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## Cost Estimates

Cost estimates are high level and consider a 3 year Total Cost of Ownership.

In consultation with IST, provide high level estimates. For staffing, it is important to include any staff that would be working on the project - even if there is no incremental cost – so that the full cost (even internal) of the project can be understood. It is also important to consider backfill of positions for larger, longer term projects. This is a three year total cost of ownership estimate which means consider all costs over 3 years. Use the financial estimating spreadsheet for help.

3 Year External Project Costs

 Hardware $99,999

 Software Licenses/Subscriptions $99,999

Maintenance Costs Year 2 and 3 $99,999

 Consulting Services @ 99 Hours $99,999

 **Total External Costs $99,999**

3 Year Internal Project Costs

 IST Staff @ 99 Hours $99,999

 Dept. Staff @ 99 Hours $99,999

**Total Internal staff Costs $99,999**

**Total Project Cost $99,999**

Annual External Ongoing Costs

 Software Licenses/Subscriptions $99,999

 Consulting Services $99,999

 **Total Annual External Ongoing Costs $99,999**

Annual Internal Ongoing Costs

 IST Staff @ 99 Hours $99,999

 Dept. Staff @ 99 Hours $99,999

 **Total Annual Internal Ongoing Costs $99,999**

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### Financial Commentary

Provide some commentary on costs of the project and the 3 year total cost of ownership to explain at a high level the impact of the project. [100 words]

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### Funding Source

List all funding sources and the funding amounts as available. If funding has not yet been secured, indicate that funding is required. [one statement]

Fully funded by the department. [or Funding Required.]

If fully funded, please provide:

|  |  |
| --- | --- |
| Funding Unit | Choose an item. |
| Funding Type | Choose an item. |
| FOAP |  |

## Quantifiable Benefit

Thinking about measurable benefits is important when considering an investment. Benefits can be moving staff to higher value work, measurable improvement in speed of processing, enhanced experience by clients. There are lots of ways to define measurable. Provide 2-5 things that can be measured to help assess success and ensure we are focused on the right thing. [Bullets]

* Benefit 1
* Benefit 2
* Benefit 3

Key Milestones

List the major waypoints or gates for the project. Make assumptions about when they need to happen and indicate if there are critical dates that must be met. This can be specific as a date or as general as a “third quarter”. [3-5 Bullets]

* Milestone 1
* Milestone 2
* Milestone 3

Categorization

|  |  |  |
| --- | --- | --- |
| Classification | Choose an item. |  |
| Portfolio | Choose an item. |  |