**Business**

**Case**

**[Project Name]**

Date

*[Department]*

*University of the Fraser Valley*

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***of the University of the Fraser Valley.***

|  |
| --- |
| **[delete this page]****Instructions for this template**This document is your template for producing a University of the Fraser Valley business case. A business case states the high-level overall goals and vision for a project by a Faculty, department or unit seeking funding, approval, or both for an activity, initiative, or project. Sections within this template should act as a guideline. Please add and adjust sections as required for your business case. Using this Template:1. Replace the title on the cover page with “Business Case:”, the name of your project.
2. Right click on the document header, select **Edit Header** and replace the [bracketed text] with your project name and delete the brackets.
3. Save your document with a file name of your choice.
4. Complete the template sections. *Note each section contains brief instructions written in italics and [bracketed], which should be removed once your document is finalized.*
5. Update the table of contents by right-clicking on the table of contents and selecting **Update Field**, then **Update entire table**.
6. Delete this page
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# EXECUTIVE SUMMARY

*[Provide an executive summary (high level) that captures only the essential elements of the business case being presented. Include the business case’s most pertinent facts in a clear, concise, and strategic overview.]*

PROJECT DESCRIPTION

BACKGROUND INFORMATION

STRATEGIC ALIGNMENT

ENVIRONMENT ANALYSIS

RECCOMENDATIONS

IMPLIMENTATION STRATEGY

REVIEW & APPROVAL PROCESS

# PROJECT DESCRIPTION

*[Use the following sections to identify the need (problem or opportunity) facing the University, and/or department/unit and the desired business outcomes.]*

## Proposed Project

*[Given the information below, describe the essential features of the proposed project in general terms, leaving detailed specifics to the rest of the document. This section should be short and straightforward.]*

## Business Need

*[Describe the current environment and any current issues, detailing the problem(s), need(s) and/or opportunities etc. together with the issues this project will address*.]

## Drivers for Change

1. *[Identify the internal and external drivers that have triggered this project proposal. Outline any research that has been done and identify why the proposed project is to be undertaken (examples: (safety, funding availability, governance, etc.).]*

## Project Outcomes

*[Describe the expected results or benefits (high level) that the project is striving to achieve.]*

## Related Projects/Proposals

*[Identify any internal and external projects or proposals which may have an impact on this project or will be impacted by it, such as other projects that may use the same resources or budgets, or may even have been established to address similar needs.]*

## Strategic Alignment

*[Describe how the proposed project fits within the University’s broader strategic context and contributes toward UFV’s goals and objectives.]*

# DESIRED OUTCOME AND CONSTRAINTS

## Prioritized Requirements *(High Level)*

*[Describe or list the key requirements to fully address the business need.]*

## Assumptions

*[Provide a list of the assumptions related to the key requirements and describe the potential impact of those assumptions if they are not addressed.]*

## Constraints

*[Identify any restrictions or limitations, either internal or external to the project that will affect its delivery or outcome.]*

## Dependencies

*[Describe any dependencies related to the overall business need, requirements, or solution.]*

## Scope Boundaries

*[Identify what is to be included within the scope of the project and explicitly state what is excluded.]*

### In Scope

### Out of Scope

## Resources Required

*[Describe key stakeholders and resources, their specific roles, and their contributions to the realization of the investment. A stakeholder is any person, group or organisation whose interests may be impacted by the project. Identify them, and their interest in the project.]*

|  |  |  |
| --- | --- | --- |
| **Key Stakeholders** | **Role to the project** | **Contribution**  |
|  |  |  |
|  |  |  |
|  |  |  |

## Funding Information & Estimates

### Funding Source

|  |  |
| --- | --- |
| **Item** | **Amount** |
|  | $ |
|  | $ |
|  | $ |
| TOTAL | $ |

# VIABLE OPTIONS

## Environment Scan

## List the Possible Options

*[Identify the options (high level) that can address the business need. Identify to the level of detail appropriate for this template. Options are defined in increasing detail as the project moves forward and is refined further in an options analysis.]*

**Option 1: Status Quo**

**Description:**

**Cost:**

**Advantages and Disadvantages:**

|  |  |
| --- | --- |
| Advantages and Opportunities  | Disadvantages and risks |
|  |  |
|  |  |

**Business and Operational Impacts:**

***[****identify known business and operational that may arise from the project. Examples: Staff training required, system outage.]*

**Option 2: [name of option]**

**Description:**

**Cost:**

**Advantages and Disadvantages:**

|  |  |
| --- | --- |
| Advantages and Opportunities | Disadvantages and risks |
|  |  |
|  |  |

**Option 3: [name of option]**

**Description:**

**Cost:**

**Advantages and Disadvantages:**

|  |  |
| --- | --- |
| Advantages and Opportunities | Disadvantages and risks |
|  |  |
|  |  |

**Option 4: [name of option]**

**Description:**

**Cost:**

**Advantages and Disadvantages:**

|  |  |
| --- | --- |
| Advantages and Opportunities | Disadvantages and risks |
|  |  |
|  |  |

# RECCOMMENDATION

*[Based on the options listed above, identify which option should be selected. List recommended next steps to advance the opportunity to the next activity.]*

## Implementation Strategy

### Timeline

|  |  |
| --- | --- |
| **Milestone** | **Proposed Completion Dates** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### Communication Plan

*[Detail any high-level internal or external communication considerations. This should include identifying any impacted departments/campuses. Examples: timeline, audience, information flow etc.]*

# REVIEW & APPROVAL

*[This section contains the signatures of key stakeholders, indicating that they agree with the presentation or proposal as it appears in the business case.]*

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*Full name* Date

*Executive Sponsor*

*Position*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Full name* Date

*Project Sponsor*

*Position*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Full name* Date

*Project Manager*

*Position*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Full name* Date

*Title*

*Position*

# APPENDICES

# GLOSSARY OF ACRONYMS & TERMS

|  |  |
| --- | --- |
| Acronym or Term | In Full or Definition |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |