**Purpose**: Use this document to present a Business Case to the Governing Body. It is usually created by an Investigation Team after a Business Request has been submitted. This document builds on the information in the Business Request and is presented to the Governing Body, which reviews and determines if there is justification to establish a team and charter a project.

**Submitter:**

|  |  |  |  |
| --- | --- | --- | --- |
| Name: |  | Email: |  |
| Title: |  | Phone: |  |

**Executive Sponsor (if currently identified):**

|  |  |  |  |
| --- | --- | --- | --- |
| Name: |  | Email: |  |
| Title: |  | Phone: |  |

**Recommended Project Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

1. **The Recommendation**

*(This section will be filled out last by the Investigation Team, but is the first thing that the Governing Body will read. It is a high-level discussion of the recommendation at hand. What do you want them to agree to do and prioritize as a result of this idea? When developing this document, fill out Questions 2 -9 first, then return to Question 1 to write the recommendation.)*

1. **Background**

*(Explain briefly what factors led to identification of the recommendation or highlight of the problem, mandate, or opportunity. What factors are already in motion?)*

1. **Analysis**

*(Lay out the options the Investigation Team looked at to arrive at their recommendation. Summarize each option reviewed and what led to it being dismissed as the best option. The team should list any facts and educated assumptions that the team identified. Analyze any alternatives that were included in the Business Request.)*

1. **Benefits**

*(Why does the University want to begin a project to implement this idea? What are the benefits to daily work or the strategic plan? How many people will be helped?)*

1. **Timing**

*(What is the anticipated start and duration of the solution? Indicate the confidence in project start and completion estimates. Are there any dependencies on other projects (anything waiting on this or is this waiting on others)? When are resources (IT and functional) available for planning/execution/testing/training?)*

1. **Risks (SWOT Analysis)**

*(Every idea comes with some risk. Many times, the benefits far outweigh those risks, but they should still be identified in order to mitigate them as easily as possible. Use the strength of a diverse Investigation Team and the SWOT analysis tool to identify potential risks with the recommendation and barriers to getting it done. Provide a narrative of your initial team discussions of how the project could avoid those risks.)*

1. **Budget/Financial Impact**

*(The team should be able to estimate any capital costs for this recommendation, any costs for implementation, and what this idea will cost in ongoing support. Think about what technical tools may be needed, any consulting dollars, and any hardware/software needs. If possible, show a true financial impact by listing any costs that may cease if this idea is implemented. Where costs are not certain, indicate a minimum and maximum estimate.)*

1. **Appendices**

*(Optional: List appendices that are attached to provide additional information that the team feels complements this recommendation for the use of the Project Team or Governing Body.)*

1. **Sign Off/Prioritization/Strategic Alignment**

*(The Governing Body will balance this idea with others and make a decision to archive the idea with the SPMO or move forward to prioritize the idea and begin forming a project team. If they determine a need or desire to move forward, sign off will come with identification of an Executive Sponsor, a prioritization, and a statement about how this project is helping to move the University closer to one of its strategic goals.)*

**9a: Submit to the Governing Body**

|  |  |
| --- | --- |
| Investigation Team Lead |  |
| Title |  |
| Signature |  |
| Date |  |

If this Business Case is approved, the development of a Project Charter will begin. The Charter is expected to be delivered by: *(date)* \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**9b: Governing Body Sign-off**

|  |  |
| --- | --- |
| Governing Body approval |  |
| Prioritization |  |
| PM to be requested? | *(Yes/No)* |
| Date |  |
| Strategic Alignment: |  |

**For office use only: UM Business Request ID Number(s), if any exist.** (Request ID Number(s):)