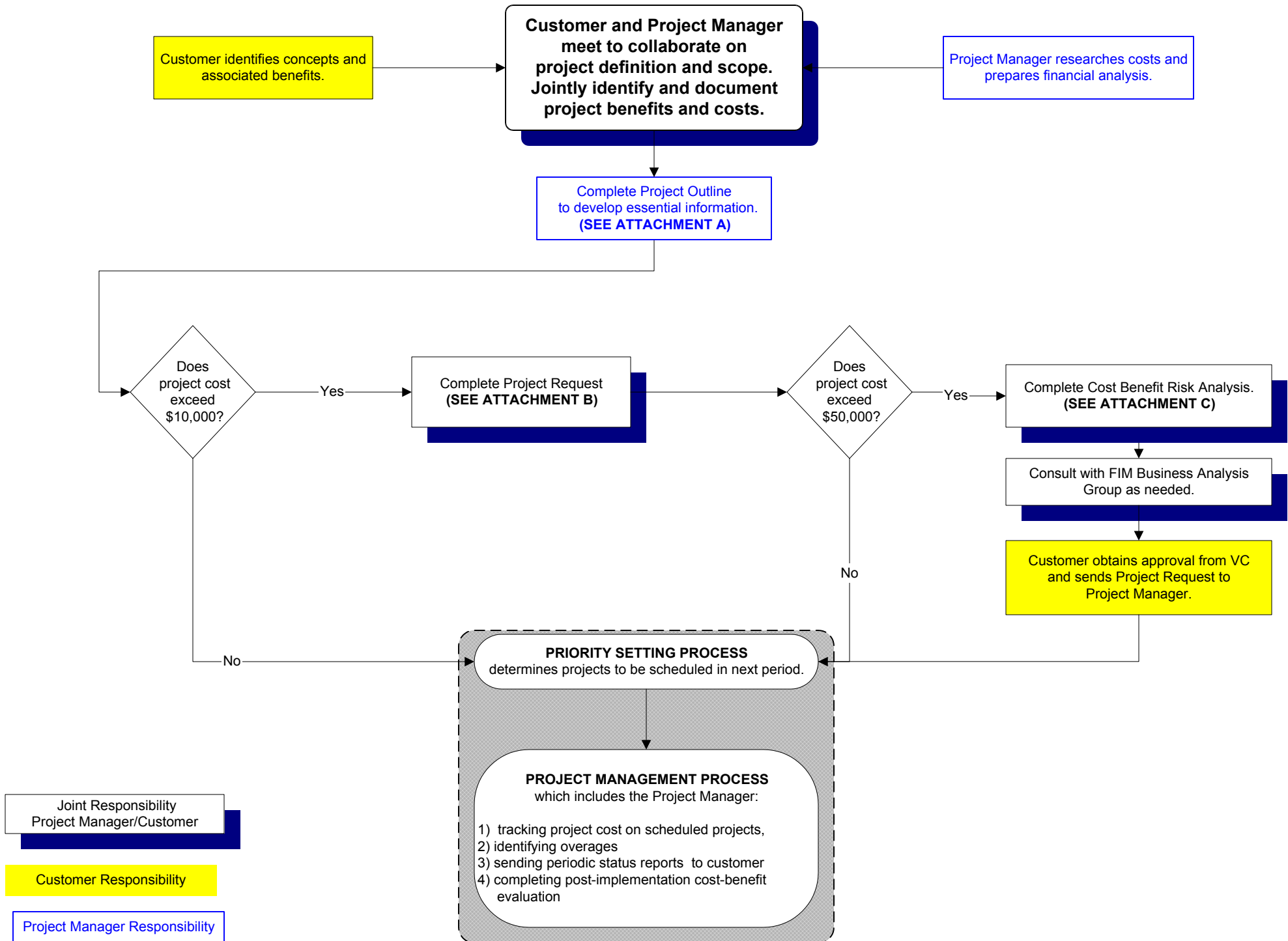


# EXTERNAL AFFAIRS COST BENEFIT ANALYSIS PROCESS



**ATTACHMENT A**

**EXTERNAL AFFAIRS  
PROJECT CONCEPT OUTLINE**

**FOR USE BY PROJECT MANAGER:**

Use these questions to help gather the essential information about a customer's new project. This should be done via phone or in-person - do NOT give this to the customer to complete by themselves. Document the customer's answers below.

Customer Contact \_\_\_\_\_

Date: \_\_\_\_\_

Project Manager: \_\_\_\_\_

***WHAT IS THE PROJECT OR REQUEST?***

***WHAT WILL THE PROJECT DO?***

***WHO WILL BENEFIT FROM THE PROJECT RESULTS?***

***HOW WILL THIS CHANGE YOUR WORK OR THAT OF OTHERS?***

***WHAT IS YOUR TIME FRAME? When do you really need it?***

Estimated to be over 100 hours?	YES	NO	If "YES" to either then complete the Project Request.
Estimated to be over \$10,000	YES	NO	

ATTACHMENT B

**EXTERNAL AFFAIRS - PROJECT REQUEST**  
*(Complete only if Project Costs exceeds \$10,000)*  
*(To be completed by Project Manager with Customer)*

Project ID: \_\_\_\_\_

**SUMMARY**

**1** Project Description

**2** Anticipated Benefits

\_\_\_\_\_ \$0

**3** Anticipated Costs

\_\_\_\_\_ \$0

**SPECIFICATIONS:**

**4** Project Deliverables

**5** Target Dates

**6** Risk Analysis

(If cost exceeds \$50,000)

**APPROVALS**

**7** Approved by Requesting Department AVC

\_\_\_\_\_ Date

**8** Project Manager

\_\_\_\_\_ Date

**VICE-CHANCELLOR APPROVAL (if project cost exceeds \$50,000)**

**9** Vice Chancellor

\_\_\_\_\_ Date

**ATTACHMENT B**

<b>EXTERNAL AFFAIRS - PROJECT REQUEST Benefit and Cost Details</b>
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**10** BENEFITS DETAIL - *To be completed by Customer*

	Tangible		Intangible	
	Description	Amount	Description	
<b>Recurring</b>		\$0		
<b>Non-Recurring</b>		\$0		
	<b>Total Tangible Benefits</b>			<b>\$0</b>

**11** COST DETAIL - *To be completed by Project Manager*

	Project Mgr Staff		Requestor's Staff		Total	
	Hours	Cost	Hours	Cost	Hours	Cost
		(@ \$100/hr)		(@ \$0 /hr)		
Development:	0	\$0	0	\$0	0	\$0
Testing:	0	\$0	0	\$0	0	\$0
Hardware:	0	\$0	0	\$0	0	\$0
Software	0	-	0	-	0	\$0
Consultants	0	-	0	-	0	\$0
Other	0	-	0	-	0	\$0
<b>Total Development Cost</b>	-	-	0	-	-	-
On-going support:	0	\$0	0	\$0	0	\$0
<b>Total Cost</b>	-	\$ -	-	\$ -	-	\$ -

## ATTACHMENT C

### COST / BENEFIT RISK ANALYSIS

(Complete only if project cost exceeds \$50,000)  
 (To be completed jointly by Project Manager and Requesting Department)

Department _____	Division _____	
Project Title _____		Project ID: _____
Project Requestor: _____		
Date _____	Prepared by _____	

**Circle the number on the scale from 1 (lowest risk) to 10 (highest risk) which best represents this alternative.**

#### LEVEL OF RISK

#### ECONOMIC RISK

**Low      Medium      High**

1. Length of the project's payback. *The shorter the payback, the lower the risk.*
2. Length of the project's development time. *The shorter the development time, the less likely objectives, users, and development personnel will change; consequently the lower the risk.*
3. Ratio of people costs to total cost. *The greater the proportion of people costs to total costs, the higher the risk.*
4. Significant budgetary implications resulting from this project.

1...2...3...4...5...6...7...8...9...10

1... 2...3...4...5...6...7...8...9...10

1...2 ...3...4...5...6...7...8...9...10

1...2 ...3...4...5...6...7...8...9...10

**L    M    H**

points                      assessment

#### TECHNICAL RISK

1. Project staff skills and clarity of project design requirements. *Technical risk is reduced where similar problems have been solved or the design requirements are clear to all project participants.*
2. Proven and accepted equipment and software. *Tried and tested hardware and software components carry lower risk; projects that are novel or break new ground carry higher risk.*
3. Project complexity. *A project requiring a high degree of technical skills and experience will be higher risk than one that is less sophisticated and can be handled by less specialized people.*
4. Dependence on outside resources and compliance to their technical specifications. *Dependence on outside resources adds risk to the project.*

1...2 ...3...4...5...6...7...8...9...10

1...2 ...3...4...5...6...7...8...9...10

1...2 ...3...4...5...6...7...8...9...10

1...2 ...3...4...5...6...7...8...9...10

**L    M    H**

points                      assessment

## ATTACHMENT C

### OPERATIONAL RISK

- |   |   |
|---|---|
| 1. User acceptance. <i>Stronger user support of the project, reduces the risk of failure.</i>   | 1...2 ...3...4...5...6...7...8...9...10 |
| 2. Changes to organizational policies and structure. <i>The more a project influences relationship changes within an organization or impacts existing policies, the greater the risk.</i>   | 1...2 ...3...4...5...6...7...8...9...10 |
| 3. Changes to method of operation, practices and procedures. <i>The more a project effects major changes to operating procedures in an organization, the greater the risk. Does implementation require continuous training building on existing knowledge or complete re-training? Complete retraining adds to the risk of the project.</i> | 1...2 ...3...4...5...6...7...8...9...10 |
| 4. Degree of project/process fit with existing structure. <i>Additional management resources required for implementation may impact scheduling and increase risk.</i>   | 1...2 ...3...4...5...6...7...8...9...10 |
| 5. Strategic interfaces among participating organizations required for this project/procedure to begin. <i>A project involving one unit or area has less risk. A high degree of consensus making lengthens the project completion time and increase risk.</i>   | 1...2 ...3...4...5...6...7...8...9...10 |
| 6. Aspects of this project requiring University, campus or consultant review. <i>This impacts length of project and risk.</i>   | 1...2 ...3...4...5...6...7...8...9...10 |

	<b>L M H</b>
points	assessment

### PROJECT RECOMMENDATION BASED ON RISK EVALUATION:

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Signature: \_\_\_\_\_  
Requesting Department

Signature: \_\_\_\_\_  
Project Manager

<b>EXTERNAL AFFAIRS - PROJECT REQUEST</b> (Complete only if Project Costs exceeds \$10,000) (To be completed by Project Manager with Customer)		Project ID: <input style="width: 100%;" type="text"/>
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**SUMMARY**

<b>1</b> Project Description	Electronically automate data capture and collection by The UCLA Fund in the Campus Call System into Advance.
<b>2</b> Anticipated Benefits \$75,000	This project will allow the capture and transfer of data to Advance at a single point of entry in a timely and efficient manner. By affecting a diminished need for data entry this allows a redirection of resources to move value added services.
<b>3</b> Anticipated Costs \$57,500	  

**SPECIFICATIONS:**

<b>4</b> Project Deliverables	Automated submission of credit card charges for first and subsequent credit card payments. Automated transfer of gift/pledge and credit card data to Advance. Availability of control reports for reconciliation. Automated transfer of biographic data to Advance.
<b>5</b> Target Dates	September 2001: Design architecture to support automation of Call Center upload to Advance. November 2001: Automated gift/pledge and credit card entry into Advance. Provide journal reports of biographic updates for entry into Advance. March 2002: Automate biographic data updates into Advance.
<b>6</b> Risk Analysis  (If cost exceeds \$50,000)	Economic risk - Low Technical risk - Low: We are relying on an outside resource (Ruffalo Cody) but feel the risk is mitigated somewhat by working with them to be sure that they can comply with our technical requirements. Operational risk - Low: We recognize that there is a medium risk for two operational factors involving changes to organizational policies and structure; changes to practices and procedures.

**APPROVALS**

<b>7</b> Approved by Requesting Department AVC	_____ Date
<b>8</b> Project Manager	_____ Date

**VICE-CHANCELLOR APPROVAL (if project cost exceeds \$50,000)**

<b>9</b> Vice Chancellor	_____ Date
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**ATTACHMENT B - SAMPLE**

<b>EXTERNAL AFFAIRS - PROJECT REQUEST</b>
<b>Benefit and Cost Details</b>

**10** BENEFITS DETAIL - *To be completed by Customer*

	Tangible		Intangible	
	Description	Amount	Description	
<b>Recurring</b>	1. Savings on student workers and supervision <span style="float: right;"><b>\$20,000</b></span> 2. Eliminates redundant manual data entry (1 FTE) <span style="float: right;"><b>\$35,000</b></span> 3. Increase earnings from earlier receipt of funds due to automation processing <span style="float: right;"><b>\$15,000</b></span> 4. Reduce rework of data entry errors <span style="float: right;"><b>\$5,000</b></span>		1. Timely entry of gift, pledge, bio data onto Advance. 2. Allows for tighter coordination. 3. Reduces risk of data entry errors 4. Customer perceives a more efficient operation. 5. Model for integrating future data uploads to Advance. 6. Donor perceives UCLA is efficient and timely 7. Facilitates reconciliation process.	
<b>Non-Recurring</b>		\$0		
	<b>Total Tangible Benefits</b>			<b>\$75,000</b>

**11** COST DETAIL - *To be completed by Project Manager*

	Project Mgr Staff		Requestor's Staff		Total	
	Hours	Cost	Hours	Cost	Hours	Cost
		(@ \$100/hr)		(@		/hr)
Development:	475	\$47,500	0	\$0	475	\$47,500
Testing:	0	\$0	0	\$0	0	\$0
Hardware:	0	\$0	0	\$0	0	\$0
Software	0	10,000			0	\$10,000
Consultants	0	0			0	\$0
Other	0	0			0	\$0
<b>Total Development Cost</b>	<b>475</b>	<b>57,500</b>	<b>0</b>	<b>-</b>	<b>475</b>	<b>57,500</b>
On-going support:	0	\$0	0	\$0	0	\$0
<b>Total Cost</b>	<b>475</b>	<b>\$ 57,500</b>	<b>-</b>	<b>\$ -</b>	<b>475</b>	<b>\$ 57,500</b>