IT Project Business Plan Template for DES
December 2011

Make a copy of this template, remove any unnecessary sections, remove the Description and/or Example text after reading and you are ready to start writing your business plan. As an alternative, you could start with the IT Project Business Plan Template Shell document which does not include any of the descriptions or examples.

Section 1 - Overview

Summary Description of Project
Description: A few sentences to a paragraph or two that describes the project in general. It should clearly and simply outline the primary objective(s) of the project.

Scope/extent of project
Description: The boundaries of the project – particularly if it is a large project broken up into smaller phases. It describes the starting and ending points for the project – what is included and what is not. For example, a project to put a particular permit process online as quickly as possible could have a scope that is limited to automating the existing process and using the existing permit application forms, whereas a similar project to put another permit process online but with a focus on streamlining/improving the process might have a broader scope that includes changes to both the process and the forms.

Justification for project
Description: Why the project is needed, the answer to the "so what?" question. The justification could be to respond to a new law, rule or reporting requirement, to improve an inadequate information system that doesn't meet the program's needs, to implement the results of a Lean project, etc. The justification should explain what may/will happen if the project is not completed.

Risks
Description: Identify any known risks that could get in the way of successful project completion. This could be something as minor as needing to avoid user testing during the summer for a program that has most of its people doing field work during the summer, or something as significant as depending on future competitive grant funding in order to complete some critical aspect of the project.

Project constraints
Description: Key factors that affect or constrain the project such as rules, reporting requirements, schedule/timeframe, budget, business rules, etc.

Alternative solutions considered
Description: What other solutions were considered besides the one described in the plan, and why were they not chosen. If the project involves creating or modifying an existing information

system using DoIT staff, examples of alternatives are: acquiring commercial-off-the-shelf software; issuing a Request for Proposal to hire an outside vendor; using another existing system to meet the need; or using an Excel spreadsheet or similar non-database option.

Section 2 - Stakeholders

Table of Key Personnel Involved in Project

Person's Name	Project Role	Agency	Signature of Approval
	Sponsor	DES	
	Project Manager	DES	
	Business Analyst	DES	
	Point Person	DES	
	Developer	DoIT	
	Program Staff/Tester	DES	
	Program Staff/Tester	DES	
	DoIT DES Liaison	DoIT	

Other team members
Description: Other stakeholders in the project besides the key ones noted in the table above. This can be a general description of the additional internal/external customers, "fresh eyes" to the project, etc.

Project commitment
Description: Statement that the right people are involved in the project, staff resources will be available to work on the project in a timely manner, and the business plan contains full disclosure of all items that affect the project and its scope. This is the equivalent of a contract between DoIT and DES staff.

Section 3 – Timeline and Budget

Project timeline
Description: See Q:\Lean\Projects\Comm Office\DoIT\Strategic IT Project Assessment\Implementation Plan\IP Task 3 Resource Alloc Plan_Sarah\Task 3 Implementation plan docs\IT Project Timeline Guidance.doc. The Business Analyst/Point Person preparing the Business Plan should work with the DoIT developer assigned to the project to use the IT Project Timeline Guidance and jointly prepare a timeline. The project timeline will be an Excel or Word table that should both be incorporated into the Business Plan and posted on a shared network drive accessible to all parties.

Comment [d1]: Do they insert a table? Get estimate from DoIT? Need to explain what actually gets put in this section or add table needed and refer to document for guidance.

Estimated project costs
Description: In most cases the primary cost will be the staff time required to complete the project, including both DoIT and DES staff. This can be calculated by taking the project timeline from above and assigning an hourly charge for all staff time involved in the project.

Use $45/hour as an average for DoIT time. Any software and hardware costs should also be included. Projects relying on contracted services should use the cost of the contract plus an estimate of the cost of associated staff time.

Duration-complexity considerations
Description: Use the criteria outlined below to help assess the technical complexity of the project, with the reliability of the time estimate going down as the complexity goes up. As with the project timeline, this component of the Business Plan should be a joint endeavor of the DES and DoIT leads for the project. The results of applying these criteria to the project should be summarized in a short paragraph that assigns the complexity to one of the three categories and identifies the particular features of the project that put it in that category.

Comment [d2]: Once again, what do you want people to enter here – just low, medium, or high complexity? Or do you want them to describe why it fits one of those criteria?

- Low Complexity – Using existing or known technology, no or limited and simple interfaces with other systems, the business process is straightforward and clearly defined, the requirements are well defined at the beginning, DoIT staff assigned have applicable experience/skills
- Moderate Complexity – Involves some new technology, multiple and/or more complex interfaces with other systems, the business process is more complicated and/or not well documented, some outstanding issues regarding the requirements, DoIT staff assigned will be doing some things for the first time
- High Complexity – Relies heavily on new technology, multiple complex interfaces with other systems, the business process is complex and either poorly or not documented, numerous outstanding issues regarding the requirements, DoIT staff assigned will be doing several things for the first time

Section 4 – Business Process

Current Process
Description: Using text and/or graphics, describe the process or work flow of the business process (such as processing a permit or conducting an inspection) as it exists today.

Future Process
Description: Using text and/or graphics to describe the business process as it will flow once the project is complete. If Lean has been used in any way, either formally or informally, to evaluate and redesign the business process then this section should incorporate the results of that work.

Section 5 – User Interface and Products

Screen mockups
Description: Examples of what each screen should look like, what actions can be taken on each screen and the navigation options. If an existing system is being modified then copies can be made of the existing screens and marked up with the desired changes. For new systems or new screens added to existing systems, the business contact should work with the DoIT developer to decide how best to prepare the new screens. Using Microsoft Visio software can be very helpful in creating brand new forms.

Outputs
Description: Identify and provide details on the reports, forms, data searches, etc. that the system needs to be able to produce.

Inputs
Description: Identify and provide details on the data, documents, and any other information or materials that the system needs to be able to accept and process.

Critical functions
Description: The key actions or activities that the system needs to support in order for the project to be successful. Systems for processing permit applications online, for example, might identify the need to handle multiple payment types as a critical function if there is a permit fee involved. The critical functions are usually the focus of the testing scenarios described in the testing, training and rollout section of this template.

User roles
Description: This is a listing of the different categories of users that need access to the system and what functions they need to be able to perform (such as only being able to view the data, to being able to view or edit some of the data, to being able to view and edit all the data). This is determined based on the roles that people play in the business process – such as administrative staff being able to do the initial data entry, or a supervisor being able to review documents before they are deemed final.

Section 6 – Back End (System) Details

Database table and column descriptions
Description: This describes in detail what is needed for columns and tables in the database down to whether the column is required, the format of the column, the size of it, and any other special considerations. Section 6 should be completed jointly with the DoIT developer.
Example:

Column Name	Type/Width	Description	Special Features/Comments
Medium	Ch(10)	Medium of sample. Need to increase from 8-10 characters to be able to handle new "Biological" medium type.	Increase column size from 8-10 characters.
TissueAnatomy	Ch (30)	The name of the anatomy from which a tissue sample	Required when WQD_Activity.Medium = "Tissue". Don't allow entry if WQD_Activity.Medium

		was taken.	does not equal "Tissue". Pick list based on new WQD_Tissue_Anatomy_Pick.TissueAnatomy
TransplantDate	Date	Date organisms are transplanted to an area for future sampling. Primarily used in paralytic shellfish poisoning (PSP) sampling.	Format MM/DD/YYYY.

Connections/interfaces with other applications
Description: Identify any direct connections with other information systems that are essential to your business. One of the most common is an interface with one of the internal DES financial systems.

Section 7 – Technical Details/Special Features Needed

Desktop hardware/software needs
Description: Is there anything out of the ordinary about the hardware and/or software needs of the project?

Infrastructure needs
Description: Beyond desktop hardware and software, identify any known requirements for additional servers, data storage or other computer network-related needs.

Telecommunications
Description: Any connections associated with remote offices or sites, such as a T1 computer line connecting the Pease office to Concord or cable service at a field office to provide internet connectivity.

Mobile devices
Description: The use of notebook computers, smartphones, personal digital assistants (PDA's), tablets or other similar mobile computing devices as an element of the project. Mobile devices are most often used by staff that spend the majority of their time out of the office doing site inspections or other activities that require mobile access to one of the agency's information systems. In some cases mobile printers are part of the solution.

Credit card processing
Description: Any application that is going to accept payments via credit card has additional security requirements that add time and cost to the project. These requirements should be discussed early on in the project with DoIT and with the DES business office.

Security concerns
Description: Besides credit card processing, security in general has become a significant issue for all types of IT projects and must be factored into the timeline. Any new application must demonstrate that it does not represent an undue risk to the State's network, and in particular public facing web applications present unique security concerns that require the developer to do things like encrypt certain information entered by the user.

Special backup or data recovery needs
Description: Identify any reasons why DoIT's normal backup and data recovery procedures would not be adequate or would not apply. Examples include a project for a remote office, or a mobile application.

Data conversion
Description: Most projects involve moving some type of existing data, even if it is in hard copy form, into a new information system. The how and when of converting this data needs to be addressed.

Data flow for Exchange Network
Description: The agency is an active participant in something called the National Environmental Information Exchange Network, or Exchange Network for short. This is a partnership primarily between state and tribal environmental agencies and EPA but also includes other governmental entities responsible for managing and reporting environmental data. Any project involving the exchange of data with EPA and/or other states in particular may include data that is represented in one of the Exchange Network data exchanges.

Web/OneStop presence
Description: Many DES projects these days include a presence on the agency's web site; this need should be considered and described if applicable. A common presence is the availability of data and/or documents via the OneStop Environmental Site Information system.

GIS interface
Description: Identify and describe any component of the project that involves the presentation of geospatial data using Geographic Information System (GIS) software.

Electronic signature/ pin and password
Description: If a project involves automating a process that in its manual form requires the submittal and/or approval of documents with legal signatures, then the need for the electronic equivalent of the signature should be considered. Another facet of electronic signatures that should be considered is the need for affixing some type of engineering or other professional stamp on documents/plans.

Document management
Description: Document versions, final or official copies of documents, and large volumes of documents are often essential elements of an IT project. The manner in which the documents will be managed, stored and retrieved should be identified.

Section 8 – Testing, Training and Rollout

Test scenarios
Description: Describe the specific steps that will be taken by the users to test that all critical functions can be performed successfully and that the information system has been built as designed.

Testing schedule
Description: Describe the total length of time set aside for user acceptance testing as well as the specific dates, times and locations for the testing. The individuals who will be doing the testing should be identified.

Training schedule
Description: Provide the same information for training as for testing, recognizing that in some cases testing and training are accomplished simultaneously.

User manual/documentation
Description: The project is not finished until all documentation is prepared. This includes some type of user manual that describes how the system works in terminology that all users can understand. User manuals can be hard copy paper documents or available in electronic form, and when electronic they can be a separate stand-alone document or offered in sections that are accessible from the relevant screen. Screen shots with instructions are a common format.

Technical documentation
Description: The DoIT developer is responsible for preparing technical documentation regarding the project that would be sufficient for another developer to be able to find, understand, maintain and if necessary modify the code used to develop the information system.

Rollout plan and schedule
Description: Describe the steps that will be taken and the schedule for moving the system from the testing mode into production, notifying all internal and/or external users that the system will be available, performing any final data conversion, and turning off any existing systems that are being replaced. It is advisable to notify the DoIT help desk when a new system is being rolled out so that they can be prepared for a possible spike in calls. As a general rule, rollout plans are more extensive for public facing web applications than internal systems.