

# Project Development Approval Process

IST Finance

Feb. 2011

DRAFT

## Project Approval Process

New Business Case Submission and  
Additional SW Dev Funding Requests for Current Projects

to

Head of IS&T and External Sponsorship Committees (ASPCC,  
SSSC, ITGC, Etc.)

**REQUIRES**

a

***Completed and Approved Project Cost Template***

So what is a project cost template?

## Project Cost Template

### IS&T Project Cost Template ***must include:***

- List of Resources (Internal & External)
- Estimated Hours on Project for each Resource
- Estimated Other Costs (Hardware, Software, Etc.)
- Estimated Ongoing Support

# Project Cost Template

The objective of the project cost template is to capture resource needs, risks and assumptions and provide a high level cost range for a project over multiple fiscal years.

FY'11 [Enter Project Name Here]											
Project Manager: [Enter Name]											
Resource	Name/ Vendor (If Available)	Associate Directorate	Type	FY'10	FY'11						
				Actual Expense	Hours		Expense				
					Low	High	Low		High		
							Rate	Expense	Rate	Expense	
<b>IS&amp;T Costs</b>											
<b>IS&amp;T Resource Costs</b>											
<b>IS&amp;T Employees</b>											
Project Manager	[Resource Name]		Internal				\$ 87.00	-	\$ 87.00	-	
QA	[Resource Name]		Internal				\$ 66.00	-	\$ 66.00	-	
Developer	[Resource Name]		Internal				\$ 66.00	-	\$ 66.00	-	
Developer	[Resource Name]		Internal				\$ 66.00	-	\$ 66.00	-	
Business Analyst	[Resource Name]		Internal				\$ 66.00	-	\$ 66.00	-	
FY'10 Actual			Internal								
<b>Total IS&amp;T Employee Costs</b>				-	-	-		-		-	
<b>Consultant Costs</b>											
Project Manager	[Resource Name]		External				\$ 125.00	-	\$ 175.00	-	
QA	[Resource Name]		External				\$ 75.00	-	\$ 100.00	-	
Developer	[Resource Name]		External				\$ 150.00	-	\$ 200.00	-	
Business Analyst	[Resource Name]		External				\$ 90.00	-	\$ 125.00	-	
Business Analyst	[Resource Name]		External				\$ 90.00	-	\$ 125.00	-	
FY'10 Actual			External								
<b>Total Consultant Costs</b>				-	-	-		-		-	
<b>TOTAL RESOURCE COSTS</b>				-	-	-		-		-	
<b>IS&amp;T Other Costs</b>											
Server Expense - Hardware	[Vendor Name]		Internal								
Software - License Fee Only	[Vendor Name]		External								
Software - Ongoing Maintance Fee (Pre-Go Live)	[Vendor Name]		External								
<b>Total IS&amp;T Other Costs</b>				-	-	-		-		-	
<b>TOTAL IS&amp;T Costs</b>				-	-	-		-		-	

# Project Cost Template

**Resources:** Project Managers should identify all resources that are needed on the project both by resource type (QA Analyst, Developer, Etc.) , name and type.

FY'11 [Enter Project Name Here]										
Project Manager: [Enter Name]										
Resource	Name/ Vendor (If Available)	Associate Directorate	Type	FY'10	FY'11					
				Actual Expense	Hours		Expense			
					Low	High	Low		High	
							Rate	Expense	Rate	Expense
<b>IS&amp;T Costs</b>										
<u>IS&amp;T Resource Costs</u>										
<u>IS&amp;T Employees</u>										
Project Manager	[Resource Name]		Internal							
QA	[Resource Name]		Internal							
Developer	[Resource Name]		Internal							
Developer	[Resource Name]		Internal							
Business Analyst	[Resource Name]		Internal							
FY'10 Actual			Internal							
<b>Total IS&amp;T Employee Costs</b>				-	-	-				
<u>Consultant Costs</u>										
Project Manager	[Resource Name]		External							
QA	[Resource Name]		External							
Developer	[Resource Name]		External							
Business Analyst	[Resource Name]		External							
Business Analyst	[Resource Name]		External							
FY'10 Actual			External							
<b>Total Consultant Costs</b>				-	-	-				
<b>TOTAL RESOURCES</b>				-	-	-				
	[Vendor Name]									
	[Vendor Name]									
	[Vendor Name]									
	nce Fee (Pre-Go Live)									
<b>TOTAL IS&amp;T Costs</b>				-	-	-				

- Who do you need?**
- Project Manager
  - Business Analysts
  - QA
  - Developers
  - Data Mgmt Analyst
  - Database Administrator
  - Interface Design
  - Training

Identify Resource Type

Identify Resource Name (if possible)

# Project Cost Template

**Current Project – Actuals:** For Current Projects that require additional funding, make sure you add any Prior Year and Current Year Actual Expenses

FY'11 [Enter Project Name Here]											
Project Manager: [Enter Name]											
Resource	Name/ Vendor (If Available)	Associate Directorate	Type	FY'10	FY'11						
				Actual Expense	Hours		Expense				
					Low	High	Low		High		
							Rate	Expense	Rate	Expense	
<b>IS&amp;T Costs</b>											
<b>IS&amp;T Resource Costs</b>											
<b>IS&amp;T Employees</b>											
Project Manager	[Resource Name]		Internal					\$ 87.00	-	\$ 87.00	-
QA	[Resource Name]		Internal					\$ 66.00	-	\$ 66.00	-
Developer	[Resource Name]		Internal					\$ 66.00	-	\$ 66.00	-
Developer	[Resource Name]		Internal					\$ 66.00	-	\$ 66.00	-
Business Analyst	[Resource Name]		Internal					\$ 66.00	-	\$ 66.00	-
FY'10 Actual			Internal								
<b>Total IS&amp;T Employee Costs</b>				-	-	-		-	-	-	-
<b>Consultant Costs</b>											
Project Manager	[Resource Name]		External					\$ 125.00	-	\$ 175.00	-
QA	[Resource Name]		External					\$ 75.00	-	\$ 100.00	-
Developer	[Resource Name]										
Business Analyst	[Resource Name]										
Business Analyst	[Resource Name]										
FY'10 Actual											
<b>Total Consultant Costs</b>											
<b>TOTAL RESOURCE COSTS</b>											
<b>IS&amp;T Other Costs</b>											
Server Expense - Hardware	[Vendor Name]		Internal								
Software - License Fee Only	[Vendor Name]		External								
Software - Ongoing Maintenance Fee (Pre-Go Live)	[Vendor Name]		External								
<b>Total IS&amp;T Other Costs</b>				-	-	-		-	-	-	-
<b>TOTAL IS&amp;T Costs</b>				-	-	-		-	-	-	-

**Other Costs:**

- Hardware
- Software
- Software Maintenance Expense (Usually just one year)\*\*



# Project Cost Template

**Current Project – Actuals:** For Current Projects that require additional funding, make sure you add any Prior Year and Current Year Actual Expenses

FY'11 [Enter Project Name Here]											
Project Manager: [Enter Name]											
Resource	Name/ Vendor (If Available)	Associate Directorate	Type	FY'10	FY'11						
				Actual Expense	Hours		Expense				
					Low	High	Low		High		
							Rate	Expense	Rate	Expense	
<b>IS&amp;T Costs</b>											
<b>IS&amp;T Resource Costs</b>											
<b>IS&amp;T Employees</b>											
Project Manager	[Resource Name]		Interna					\$ 87.00	-	\$ 87.00	-
QA	[Resource Name]		Interna					\$ 66.00	-	\$ 66.00	-
Developer	[Resource Name]		Interna					\$ 66.00	-	\$ 66.00	-
Developer	[Resource Name]		Interna					\$ 66.00	-	\$ 66.00	-
Business Analyst	[Resource Name]		Interna					\$ 66.00	-	\$ 66.00	-
FY'10 Actual			Interna								
<b>Total IS&amp;T Employee Costs</b>				-	-	-	-	-	-	-	-
<b>Consultant Costs</b>											
Project Manager	[Resource Name]		Externa					\$ 125.00	-	\$ 175.00	-
QA	[Resource Name]		Externa					\$ 75.00	-	\$ 100.00	-
Developer	[Resource Name]		Externa					\$ 150.00	-	\$ 200.00	-
Business Analyst	[Resource Name]		Externa					\$ 90.00	-	\$ 125.00	-
Business Analyst	[Resource Name]		Externa					\$ 90.00	-	\$ 125.00	-
FY'10 Actual			Externa								
<b>Total Consultant Costs</b>				-	-	-	-	-	-	-	-
<b>TOTAL RESOURCE COSTS</b>				-	-	-	-	-	-	-	-
<b>IS&amp;T Other Costs</b>											
Server Expense - Hardware	[Vendor Name]										
Software - License Fee Only	[Vendor Name]										
Software - Ongoing Maintance Fee (Pre-Go Live)	[Vendor Name]										
<b>Total IS&amp;T Other Costs</b>											
<b>TOTAL IS&amp;T Costs</b>											

For Current Projects that require more funding, make sure you add any Prior Year and Current Year Actual Expense





# Project Cost Template

## **Current/ New Project – Plan:**

Hours Estimates should take into consideration:

### **Small Projects:**

- Business Analysis
- Planning
- Scope and Requirements Sign-off
- Design
- Implementation
- Documentation
- Quality Assurance
- User Testing
- Usability
- User Training

### **Large Projects:**

#### **Discovery Phases:**

- Business Analysis
- Planning
- Scope and Requirements Sign-off
- Design Options (Standard, Moderate Customization, High Customization)

#### **Implementation Phases:**

- Final Design
- Implementation
- Documentation
- Quality Assurance
- User Testing
- Usability
- User Training

# Project Cost Template

## Project Assumptions:

FY'11 [Enter Project Name Here]										
Project Manager: [Enter Name]										
Resource	FY'10	FY'11								Assumptions
	Actual	Hours		Expense				Expense		
				Low		High		Low	High	
	Expense	Low	High	Rate	Expense	Rate	Expense	Expense	Expense	
<b><u>Project Cost Summary</u></b>										
<b><u>IS&amp;T Costs</u></b>										
<b><u>IS&amp;T Resource Costs</u></b>										
<b><u>IS&amp;T Employees</u></b>										
Project Manager										
QA										
Developer										
Developer										
Business Analyst										
FY'10 Actual										
<b>Total IS&amp;T Employee Costs</b>										
<b><u>Consultant Costs</u></b>										
Project Manager										
QA										
Developer										
Business Analyst										
Business Analyst										
FY'10 Actual										
<b>Total Consultant Costs</b>										
<b>TOTAL RESOURCE COSTS</b>										
<b><u>IS&amp;T Other Costs</u></b>										
Server Expense - Hardware										
Software - License Fee Only										
Software - Ongoing Maintance Fee (Pre-Go Live)										
<b>Total IS&amp;T Other Costs</b>										
<b>TOTAL IS&amp;T Costs</b>										

All Assumptions should be documented in your project template



# Project Cost Template

## What Assumptions Should be Documented:

### **Scope, Requirements and Timeline:**

- What general assumptions have you incorporated into your estimate? (Sponsorship, Drivers, Resource Requirements (both business and IS&T), Etc.)
- Do you have a clearly defined scope requirements?
- Who approved them?
- Are there any key dates or milestones that should be documented in assumptions (or can only go live in June, etc.)?
- Are there multiple phases? Have those been vetted? Are they well defined?

### **Technical Requirements and Project Risks**

- What are some of the risks associated with this project? (scope creep, funding, key resource issues both on business and or IT side, internal vs. external, change management requirements, etc.)
- What is the technology we will be using? Is it new or existing? Or will that be decided later?

### **Cost**

- What consultant rates did you use? (was there a specific agency or skill set they were based off of)
- What contingency rate have you built in on the high side? Why?
- Has ongoing maintenance expense been discussed? (for example if we buy external software will they pay the annual maintenance fee?)



# Software Development Project Approval Process

***Now I have a....***

***Completed and Approved Project Cost Template***

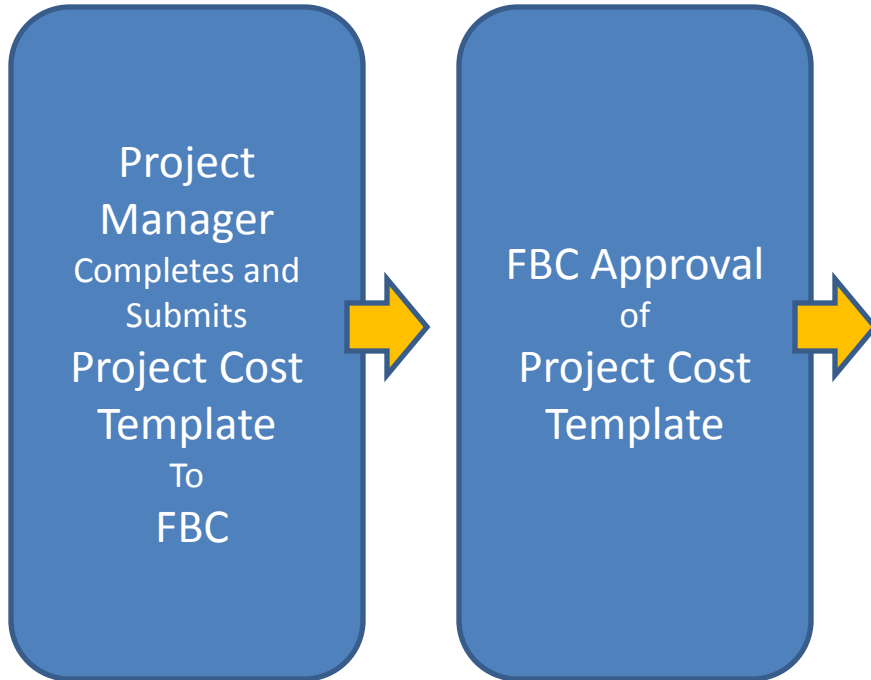
So what is the approval process?

# Software Development Project Approval Process



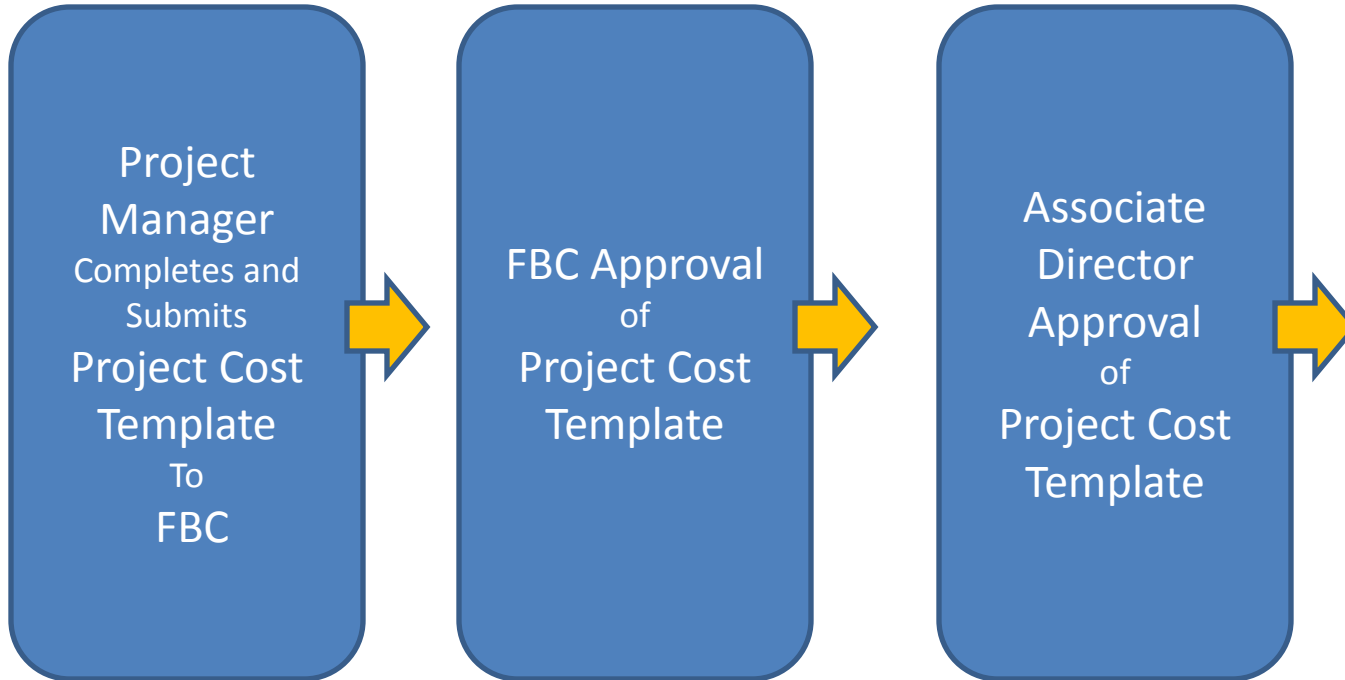
**Step 1:** IS&T Project Cost Template must be completed and submitted to your Associate Directorate Financial Business Consultant. It is recommended that all Project Managers set up an in-person meeting with their FBC to discuss assumptions and issues. Guidance on filling out the IS&T Project Cost. Template can be provided by your Team Lead or your FBC.

# Software Development Project Approval Process



**Step 2:** Once the IS&T Project Cost Template is submitted all assumptions will be reviewed and approved by the area FBC.

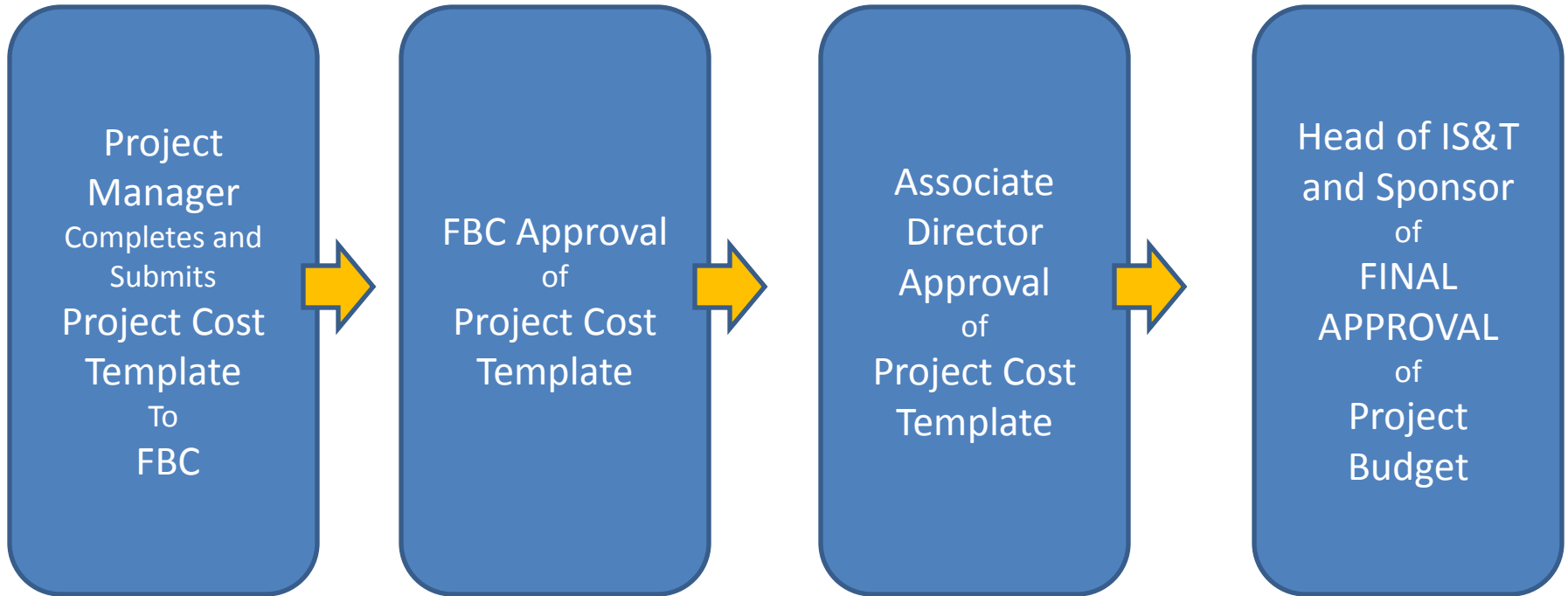
# Software Development Project Approval Process



**Step 3:** Once the Project Manager has received FBC's approval, the Project Manager can submit the template for Associate Director approval.



# Software Development Project Approval Process



**Step 4:** Once Associate Director approval is received, the project and the costs outlined in the IS&T Project Cost Template can be submitted to the Head of IS&T for approval and then to External Sponsorship Committees (ASPCC, SSSC, ITGC, Etc.) for FINAL APPROVAL.