

Business Case Process Handbook



Office of the Chief Information Officer

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Table of Contents

| | |
|--|----|
| Introduction..... | 3 |
| Project Analysis and Support Subcommittee Overview | 3 |
| Project Management Cycle | 5 |
| IT Governance Model Overview..... | 6 |
| Investment Review Criteria..... | 8 |
| Agency Project Preparation | 9 |
| Business Case Template..... | 10 |
| Building the Business Case..... | 11 |
| Business Case Review Cover Sheet | 11 |
| Executive Summary | 11 |
| Introduction | 12 |
| Background | 12 |
| Purpose..... | 12 |
| Customer Benefits..... | 12 |
| Business Objectives/Outcomes | 13 |
| Impacts & Timing..... | 13 |
| Investment Duration | 13 |
| Location Information..... | 13 |
| Human Resources | 14 |
| Technology and Standards | 14 |
| Costs and Benefits Projections | 14 |
| Cost Projections (One-time and On-going costs)..... | 14 |
| Funding Sources | 15 |
| Funding Duration | 15 |
| Non-Financial Benefits to be Gained | 15 |
| Risks and Contingencies | 15 |
| Anticipated Risks..... | 15 |
| Contingency Plan..... | 16 |
| Business Case Review Checklist | 17 |
| Business Case Executive Summary Checklist..... | 18 |
| Business Case Review Process | 19 |
| Technology Procurement Guidelines | 20 |
| IT Request Form..... | 22 |
| Reference Table..... | 25 |

Introduction

Project Analysis and Support Subcommittee Overview

The Project Analysis and Support Subcommittee (PASS) assists the Information Technology Coordinating Committee (ITCC) in carrying out its tasks of identifying IT problems and opportunities, and recommends solutions to the Chief Information Officer (CIO) and the Information Technology Policy Council (ITPC) by:

- Making recommendations to the CIO and ITPC; and
- Promoting IT systems and practices that enable data and resource sharing, and cooperation among state agencies.

The primary tasks and responsibilities of the PASS are:

- Participate in the development, implementation and training of the Business Case process, Including Impact of Expenditure, Needs Analysis, Expectations, Risks, and Budget Development.
- Participate in the process to develop business case criteria for review of IT projects and purchases.
- Use business case methods to evaluate major investments/purchases of executive branch agencies and make recommendations to the ITPC and CIO.
- Assists in the development of best practices and methodologies to ensure IT projects are appropriately designed, tracked, monitored, and guided by executive branch agencies to achieve the expected business results.

In an effort to meet the objectives listed above, the PASS and the Office of the Chief Information Officer (OCIO) developed the Business Case Handbook. The Business Case Handbook serves as an instructional guideline in order for investments and purchases to be developed and reviewed in a format that clearly documents the impact of the business case expenditure. A business case provides the framework to allow consistency in development, evaluation and setting expectations for every expenditure request. The clear documentation from these objectives provides the opportunity to approve the request, as well as monitor the On-going performance of the effort.

Numerous templates, diagrams, flow charts, and checklists have been developed throughout the development of the business case structure. The Business Case Handbook consolidates the various documents into one instruction manual. Brief narratives and explanations give reason and understanding to each of the various documents and how they play a part in the investment lifecycle. The templates, diagrams, flow charts, and checklists are hyperlinked in the handbook. The Business Case Handbook is available online at

http://www.wyoming.gov/loc/04222011_1/Documents/Documents/Business%20Case%20Handbook/BCHandbook.pdf.

The Business Case Handbook includes:

- Project Management Cycle,
- IT Governance Model Overviews
- Investment Review Criteria
- Agency Project Preparation Checklist
- Business Case Template,
- Building the Business Case,
- Business Case Review Checklist,
- Business Case Executive Summary Checklist,
- Business Case Review Process,
- Request for Proposal Template for Technology Procurement,
- IT Request Form

Project Management Cycle

The starting point on the IT project management cycle is the business case. The business case defines the objectives and measurements which an investment will follow throughout its lifecycle. The [Project Management Cycle](#) illustrates the path an IT investment follows through its lifecycle and identifies the parties responsible for assisting and making recommendations on the various components in the project management cycle.

As an investment moves through the Project Management Cycle, a number of outcomes and activities are conducted. A graphic illustration of the individual outcomes and activities is shown in the [Project Management Cycle Detail](#).

IT Governance Model Overview

The business case is governed by the Wyoming Information Technology (IT) governance model. The [IT Governance Model](#) establishes the structure and processes used to make decisions about IT direction, needs, architecture, policies, and standards within Wyoming state government. The model specifies roles and responsibilities, decision-making authority, and accountability to direct the most effective use of Wyoming's IT resources. IT and business people from across state government and private industry in Wyoming make up the IT governance model.

There are a number of entities in the Governance model, including:

- Governor,
- Joint Appropriations Committee (JAC) and Legislature,
- Chief Information Officer (CIO),
- Information Technology Policy Council (ITPC), and
- Information Technology Coordinating Committee (ITCC) and its subcommittees .

In this model, the Governor:

- Provides authority and is the model's executive sponsor;
- Has final authority over executive branch IT recommendations and activities, except for constitutionally or statutorily mandated exceptions; and
- Makes appointments to ITPC.

The Joint Appropriations Committee (JAC) & Legislature:

- Reviews the Governor's budget recommendations and appropriates funds for IT investments.

The Chief Information Officer (CIO):

- Introduces and implements the IT vision and policies,
- Develops a biennial information technology (IT) plan,
- Adopts technical IT policies and standards,
- Implements and maintains an IT governance program,
- Ensures agency compliance with the policies and standards,
- Reviews and makes IT budget recommendations to the Governor,
- Establishes review criteria for technology investments and major purchases,
- Approves IT expenditures for the Executive Branch,
- Recommends IT procurement improvements,
- Develops and implements recommendations for proper management of IT resources, and
- Develops and promotes IT training programs.

The Information Technology Policy Council (ITPC) membership is appointed by the Governor and consists of four agency heads, a representative of the elected officials, two private industry representatives, an IT director, and an agency fiscal manager. The ITPC:

- Provides advice and counsel to the CIO and the Governor in the setting of general direction and application of IT resources within the executive branch of Wyoming state government;
- Reviews and recommends policies and standards from the ITCC; and
- Reviews and recommends business cases from a business perspective.

The Information Technology Coordinating Committee (ITCC) voting membership is composed of one member from each agency. The general membership includes all IT personnel with Wyoming state government. The ITCC:

- Makes recommendations and implements approved IT policy and direction;
- Provides a forum for cooperative efforts and information exchange;
- Promotes and helps advance the effective and efficient use of state IT resource; and
- Is a primary technical advisor to the CIO and the ITPC.

The ITCC has three standing subcommittees and may also form ad hoc workgroups as needed. The three standing ITCC subcommittees are:

- Policy and Standards,
- Leadership, Training, and Performance, and
- Project Analysis and Support.

Investment Review Criteria

Prior to starting an investment, a management team needs to estimate the total investment cost. The total investment costs as well as other factors, determine the level of review an investment will require in order to receive approval to precede. The [Information Technology Investment Review Criteria](#) provides a reference for an agency management team to determine at what point an IT investment starts in the review and approval process.

Investments generally fall into one of four categories:

- a software purchase,
- a hardware purchase,
- a contract for professional services, or
- some combination, thereof.

Agency Project Preparation

Prior to starting a project, it is necessary to examine and explore the current way things are done and look for ways they should be done. A Needs Assessment or a Request for Information (RFI) are good methods to discover the needs of the organization (Agency/Program) and what exist in the market place. However, do not rely on one specific method to gain an understanding of the business needs and objectives. Strive to obtain a complete picture from as many sources and viewpoints, as possible. Some basic techniques to gain a better understanding of what exist and what should be done to improve business are but not limited to:

- Direct observation of how something is done,
- Questionnaires/surveys to the stakeholders of the project,
- Interviews with key stakeholder and subject matter experts (SME),
- Consultation with Agency management (Project Executive Sponsor),
- Review existing and relevant documentation,
- Examine federal and/or legislative mandates and regulations,
- Establish focus groups,
- Create “what if” scenarios and test for desired outcomes,
- Review reports and records,
- Review work samples and business workflows.

Keep in mind that actual needs are not always the same as perceived needs or “wish list”. Try to identify what the organization (Agency/program) really needs to deliver the services to their ultimate customers. This may not always be clear to the stakeholders, but they may have opinions or thoughts of what is needed. The [Agency Project Preparation Checklist](#) is designed to help guide the Agency through the discovery stage of the project. Not all of the items in the checklist may be applicable to a particular project, but the majority of the questions will apply- regardless of the project size and may even generate other matters or opportunities that the Agency may choose to investigate before proceeding with the project.

Business Case Template

The [Business Case Template](#) provides the business case author a framework to work within and furnishes the evaluation group(s) a standard format in which to evaluate and review a business case. The template was designed to assist business case authors in presenting their business case in a clear and precise manner. The pieces and parts of a business case are arranged within the template to give a logical progression of the business objectives, investment costs, and risks associated with the IT investment.

Agencies submitting a business case are required to use the Business Case Template. If alternative formats are use, the business case author will be directed to resubmit in the approved Business Case Template format.

The template is arranged in the following order:

- Cover Sheet,
- Title Page,
- Table of Contents,
- Executive Summary,
- Introduction,
- Impacts & Timing,
- Costs and Benefits Projection, and
- Risks & Contingencies.

If you have questions about the template, format, order, and/or progression of the business case, please contact the Office of the Chief Information Officer (OCIO) at 777-5492 or ocio@wyo.gov. When submitting your business case for review and approval, please email it to, ocio@wyo.gov.

Building the Business Case

A business case is the tool used to gain an understanding of what the outcome of the investment will look like, and as such, is equally essential in defining what an investment needs to accomplish and the approach it needs to take in order to deliver on the outcome. It explains who, what, when, where, how and why of an IT investment.

- Why the investment is needed (ultimate customer needs and/or business, financial, functional and operational factors that drive the objectives)?
- What opportunities or alternatives are available to solve the problems of the ultimate customer and/or organization?
- What value and/or worth will the ultimate customer receive from the investment?
- How does the proposed action address the objectives and outcome of the investment?
- When does the investment start? What is its life expectancy?
- Where are the ultimate customers located and/or how many sites are impacted by the investment?
- What human resources are required and what are their roles and responsibilities to the investment?
- What is the technology and/or solution that addresses the problems and/or opportunities?
- How much will it cost to deliver the solution and realize its benefits?
- How do the uncertainties impact the outcome(s) and investment decision?
- What happens if the investment is not approved and/or does not receive appropriate funding?

Business Case Review Cover Sheet

The first section of the business case, [Business Case Review Cover Sheet](#), serves as the primary tracking form for the various evaluation groups. All business cases must have a Business Case Review Cover Sheet attached at the time an agency submits a business case to the OCIO to start the review process.

Executive Summary

Even though the Executive Summary is the first section of the Business Case, it is the last component to be written. The Executive Summary deserves careful preparation. Some of the intended evaluation group memberships may rely heavily on the Executive Summary. When writing the executive summary, imagine you only have a few minutes to explain to someone about the investment and justify your requests for resources and funding. The Executive Summary is that few minutes to explain:

- The current situation,
- The ultimate customer and their needs,
- The alternatives considered,
- The expected results or outcomes,
- The funding necessity, and
- The recommendation.

Introduction

Background

What is the basis behind the investment? The background lists the details of the problem(s) and/or the opportunities that can be taken advantage of. Giving historical and situational information to the reader(s), tells the story of where the investment has been, what the current conditions are, and the limitations. Generally, an investment is started when something is wrong or a major opportunity exists. Investment opportunities generally have one or two key themes related to the problem(s) or opportunities. Current market situations, connection to other investments or programs give relevancy to the business case.

The basis for comparable investments provides an opportunity to validate the business case assumptions. The author cannot take for granted the reader will make the same assumptions. Therefore, it is important to explicitly document the business assumptions in the business case. It is beneficial for the reader to know where the data sources come from to assist the author in arriving at the assumption(s) presented in the business case.

Purpose

What will it take for the business case to accomplish its purpose? Business cases are written for many different purposes. Some are written for decision support purposes; others are built for business planning purposes. In some cases, it is unclear what the exact objectives and outcomes of the investment may be, so the purpose of a business case may be to request funding to conduct the initial requirement analysis phase. If it is the intent to submit a subsequent business case to address the implementation and operational phases of the investment, it is advisable to mention the intent in the initial business case. If federal and/or legislative mandates provide guidance or constrain the available alternative(s), the author needs to include these in the business case.

Customer Benefits

Who is the ultimate customer(s) and what benefits and/or value will they receive from the investment? The value and worth to the ultimate customer will define the success of the

investment. Not only is identifying the ultimate customer important but it is equally important to identify the benefits for colleagues (agencies, government programs and partners).

Business Objectives/Outcomes

What are the primary objectives being considered and how will they address the ultimate customer needs and/or solve the problem(s)? An effective business case is not just an important decision-making tool for management teams. It becomes a critical means for assisting investment teams in understanding the business needs and what is expected to be delivered – the outcome(s). When primary objectives are being considered in a business case, each objective needs to be reasonable and a viable alternative to address the ultimate customer needs and/or solve the problems. In brief, when a proposed action supports an objective – be it business, financial, functional and/or operational – the business case needs to identify the key alternative(s) and opportunities to support the objective/outcome.

Impacts & Timing

The need to recognize impact and change is critical to how they will affect the outcome of the investment. The key impacts need to be fully explored and understood if a meaningful decision is to be made. Present the key assumptions, which are necessary for the business case to achieve its purpose.

Investment Duration

When does the investment begin and when will it end? It is essential to identify the various phases of the investment and the estimated timeframe to accomplish the investment. The full life expectancy of an investment should be addressed – How long will the investment need to be maintained? It is recommended, if federal and/or legislative mandates stipulate when the investment must be operational, identify it in the business case.

Location Information

Where will the ultimate customer use the investment? It is extremely important to acknowledge if the investment will be used in the rural geographical locations within Wyoming. For example, if the investment is to deploy wireless notebooks to field officers, the investment team must take into account the wireless service available in remote areas in Wyoming. This may impact the objectives and outcome of the investment. It is critical to look at the current telecommunication and network infrastructure along with the Internet connectivity in a specific site or multiple sites to determine if these sites can accommodate the investment or if upgrades will be required for the investment to be successfully implemented.

Human Resources

What human resources are required to complete the investment; what are the roles and responsibilities of the resources during the various phases of the investment and do those resources exist within the agency today? Discuss the executive sponsor's role in the investment and its authority to start/stop the investment. If it is determined a new, full time employee (FTE) is required for the investment, discuss the options to justify why the new FTE is requested, along with the position classification and number. Explain how the investment will be managed – Who will be the project manager? If Agency personnel will manage the investment, do their existing duties allow the time for the investment? Identify what central services are available and how they may be used to augment the resources of the investment. Public partnerships may play a part in the direction of the investment and their buy-in into the concept may ultimately be the defining factor, if the investment is to succeed. Speak to how these types of partnerships will be developed.

Technology and Standards

What technology and/or solution(s) address the objectives and outcomes? Will the investment be developed in-house versus purchasing a Commercial Off-the-Shelf (COTS) solution? Discuss how other states or business partners have addressed and resolved similar problems. Key components to an IT investment are the hardware and software required to operate the investment. An IT infrastructure may already be in place, which may be leverage to support the investment; however, if a new infrastructure is required, speak to the requirements and where the infrastructure will be located and who will support it. Look to central services - How can the State's IT infrastructure support the new investment, so as to not reinvent the wheel? Keep in mind the State's IT policies and standards – How will the new investment fit within the State's IT direction? Many times the focus on the investment is around the startup of an investment. It is extremely important to look beyond the implementation of an investment and identify what it will take to maintain the investment – Will maintenance licenses be required; how will the investment handle disaster recovery; how will the investment address security; and how will the investment manage e-records for e-discovery, archive and records retention rules?

Costs and Benefits Projections

Cost Projections (One-time and On-going costs)

What is it going to cost to put the investment in place and what is it going to cost to sustain the lifecycle of the investment? Normally, a business case reflects the cost impacts of a decision over a defined period of time. To be relevant, a business case must reflect what the anticipated costs associated with the decision are over multiple budget cycles. This means not just the startup costs of the investment, but also the costs of supporting the investment throughout its life expectancy, which may include internal and/or external technology costs, licensing costs,

and staffing costs. What this means is the overall cost of the investment is not the same as the startup budget. It reflects the total cost of the investment.

Funding Sources

Where will the funding come from? In order for sound decisions to be made surrounding the investment, the source of the funding must be identified – Will it be State General funds, Federal funds, Other funds or a mix? If the assumption is the funding stream may change in the lifecycle, explain why the funding will shift to a different source.

Funding Duration

What are the start-up costs (one-time costs) and what are the costs to sustain the investment throughout its lifecycle (on-going costs)? If the investment duration is linked to a funding period, tell when the funding will come available and how this will impact the investment lifecycle. If the implementation phase is in one budget cycle and the operational phase extends into subsequent one(s), point out these cycles so the reader can anticipate the impact the investment will have on future budget cycles. Summarize the costs identified in the Cost Projection Section so a high overview of exactly what the total cost of the investment will be over time.

Non-Financial Benefits to be Gained

What are the INDIVIDUAL type of benefits and how will they be measured and reported? The value and worth of the benefits can be recognized and measured in financial terms (lower cost of doing business) or it may be recognized and measured in other terms (improved customer satisfaction through customer surveys or fewer customer complaints over the phone or in person). When identifying benefits, keep in mind the benefits must be realistic, measurable and attainable. There is an enormous tendency to take every possible benefit and put it in the business case, in order to make it look desirable. Bottom line, benefits should be defined on the assumption that eventually the benefits will be evaluated and measured to determine if they were realized. Be pragmatic about what the results will accomplish, and make sure they are measurable, and in measuring them, their attainment is directly attributable to the objectives and outcome of the investment.

Risks and Contingencies

Anticipated Risks

What are the key parameters, conditions, situations and how may these uncertainties impact the investment? A key issue to investigate and speak to in a business case is associated with going forward with the investment or not going forward. The strengths, weaknesses, opportunities and risks associated with the investment must be clearly defined in order to give

credibility to the business case. On-going technology changes should be identified, if they will impact the investment decision. Discuss the efforts made with the ultimate customer to test their acceptance of the investment. What happens to the investment if the ultimate customer expectations change or customer service is disrupted? Looking forward to possible changes in Federal and/or Legislative regulations is critical in developing a credible business case.

Contingency Plan

What is the contingency plan if the investment is not approved and/or the funding is not received?

Business Case Review Checklist

The Project Analysis and Support Subcommittee (PASS) utilizes the [Business Case Review Checklist](#) to confirm the business case meets the technical requirements and standards set by the IT Governance Model. It is suggested the author use the checklist to guide and direct the business case development to assure it addresses the technical aspect of the investment. The Business Case Review Checklist is intended to point to subjects that otherwise might have been missed.

Business Case Executive Summary Checklist

As the business case flows through the evaluation process, the PASS will make a recommendation to the Information Technology Policy Council (ITPC) membership. The ITPC will review the business case to determine if it makes good business sense for the State of Wyoming. The [Executive Summary Checklist](#) is used by the ITPC to evaluate and recommend the business case to the CIO. As a self-evaluation tool, the author may use the Executive Summary Checklist to assure the key components of the Executive Summary have been addressed.

Business Case Review Process

The [Business Case Review Process](#) illustrates the path a business case follows as it goes through the review and approval process. A business case developed to justify an exception budget request requires the Governor's recommendation and the Legislative appropriation before an IT investment continues through the project management cycle. The ITCC – PASS subcommittee review provides a peer-to-peer evaluation and makes its recommendation(s) to the ITPC. In turn, the ITPC review provides a business perspective and makes its recommendation to the CIO. Based upon the ITCC-PASS and ITPC recommendations, the CIO approves or disapproves and provides budget recommendations, which is given to the Budget Office and the Governor.

Technology Procurement Guidelines

REQUEST FOR PROPOSAL (RFP) TEMPLATE REQUIRED FOR ALL FOR INFORMATION TECHNOLOGY PROCUREMENT:

The [Request for Proposal \(RFP\) Template for Technology Procurement](#) serves as a template to aid an agency in developing an RFP, following the business case approval and budget appropriation.

The first three sections of an RFP are standard boiler plate required by the Procurement Office and the Attorney General's Office and the Office of the Chief Information Officer (OCIO), respectively. An agency's concentration and development efforts are in the remaining sections of an RFP. The Administrative Information, Requirements/Specifications – Responsibilities of Contractor, Project Management and Proposal Submission Requirements – Sequential Order sections tell the vendor community who, what, where, when, why and how the agency expects the investment to be accomplished. The Evaluation Methodology and Payment Terms explain how a vendor will be selected and how payment reimbursement will be made. The Request for Proposal (RFP) Template for Technology Procurement can be found on the OCIO's website: http://www.wyoming.gov/loc/04222011_1/Documents/Documents/Business%20Case%20Handbook/BCHandbook.pdf.

The Office of the Chief Information Office (OCIO) reviews an RFP to confirm it follows the business case. It will review the scope of work to determine:

- Business and technical requirements are realistic, measurable & attainable.
- Deliverables are realistic, measurable & attainable.
- Performance requirements are realistic, measurable & attainable.
- Project accountability is evident.

The review of the evaluation criteria will assure:

- Vendor's proposal matches the RFP requirements.
- Solution is workable and has high probability of success.
- Realistic workplan is included.
- Minimum of deliverables must be stated.
- Vendor is challenged to enhance the deliverables requested.
- Deliverables and performance requirements are realistic, measurable, & attainable.
- Change and conflict management are addressed.
- Acknowledges payment is tied to successful deliverables that incrementally serve as milestones and progress status reports.

If any questions arise concerning the formatting and/or writing of a Request for Proposal, please contact the Office of the Chief Information Officer (OCIO) at 777-5492 or ocio@wyo.gov. When submitting your Request for Proposal for review and approval, please email it to, ocio@wyo.gov.

IT Request Form

Regardless of the document type being submitted to the OCIO for review and approval, the IT Request Form is required to be attached to all submittals.

The OCIO depends on the Agencies' help in reporting accurate IT expenditures with the form. Thank you.

The OCIO uses the [IT Request Form](#) to:

- Collect financial information on all IT assets acquisitions (hardware and/or software) and services (maintenance, technical support and/or consulting, etc.);
- Recommend agency exception/supplemental budget requests;
- Approve actual purchase(s) of IT investment(s) – regardless of the vehicle to purchase the hardware, software and/or services (Purchase Requisition, Request for Proposals (RFP), Professional Service Contracts, and/or Master Service Agreements (MSA)); and,
- Request a new IT Full Time Employee (FTE) or At-Will Employee Contractor (AWEC) position that is outside of or within a business case or repurposing an existing position to an IT position.

Exception/Supplemental Budget Request (regardless of amount):

In preparing an exception/supplemental budget request(s) for IT investments, an agency needs to determine the anticipated funds it will require to purchase hardware, software, and/or services for next biennium. Regardless of the cost(s), if the agency intends to submit an exception/supplemental budget request for any IT-related hardware, software or service(s) (under \$200,000), an IT Request Form must be completed and submitted to the OCIO for the CIO's recommendation prior to the exception/supplemental budget request being made.

Requests for Information and Request for Proposals:

When submitting an RFI or an RFP to the OCIO for review and approval, the Agency is required to prepare and submit the IT Request Form with the RFI or RFP. The OCIO uses the IT Request Form as its official record to track the RFI or RFP with the associated business case and provide written recommendation to release the RFI or RFP.

Contracts/Amendments/Master Service Agreements-Statements of Work:

The IT Request Form is required when an Agency submits to the OCIO an IT related contract, contract amendments and/or a MSA Statement of Work (SOW) for review and approval, regardless of the costs. The Agency submits IT related contracts, contract amendments and/or a MSA-SOW to the OCIO for review and approval, using the Electronic Submission Form via the

Attorney General's HEAT tracking system. The OCIO will sign the IT Request Form and return approved documents to the Attorney General via HEAT System.

Actual purchase(s) of IT Investment:

An IT Request Form is also required when the agency makes the actual purchase and/or lease of hardware and/or software, regardless of the cost. Routine renewal of maintenance/support services (one-time payment) requires an IT Request Form. When purchasing hardware and/or software that are a part of a business case, the OCIO requires an IT Request Form before the purchase is made.

A separate IT Request Form is required for all like items (by Agency Division) according to category (e.g. PCs, laptops, keyboards, or like software licenses).

IT FTE or AWEC Position:

When an agency intends to request a new IT FTE or AWEC position that is outside of or within a business case or is repurposing an existing position to an IT position, the agency is required to submit an IT Request Form to the OCIO for the CIO's recommendation prior to the exception/supplemental budget request being made. The OCIO will review the request and make a recommendation to the Governor concerning the inclusion of the position in the budget. Please ensure that all relevant fields in the IT Request Form are filled in.

IT Request Form Preparation:

When preparing the IT Request Form, regardless of the document being submitted for review, make sure the assigned previous OCIO tracking number is included in the appropriate field ("Prior approval tracking number") on the form. In order for the OCIO to collect and track the financial information on all IT asset acquisitions, the Agency is required to include the budget string (FY-Agy-Div-Unit-Fund-Appr-Obj). The budget string shown in the IT Request Form follows the Budget Office Budget Book standards. The IT Request Form allows for multiple budget strings, if applicable, to be included in the purchase/contract request.

The OCIO will return the IT Request Form to the Agency with the CIO's recommendation (approval/disapproval). Be sure to reference the OCIO prior tracking number assigned to the budget request in your budget narrative. When preparing the Office of Procurement purchase requisition, make certain the approved IT Request Form is attached to the purchase requisition. When submitting a contract/amendment or MSA to the Office of Procurement, make sure the HEAT System tracking sheet is attached to the purchase requisition.

All IT Requests are validated through the Budget Office and/or Human Resources (HR).

NOTE: PLEASE ENSURE THAT ALL FIELDS IN THE IT REQUEST FORM ARE FILLED IN; IF NOT, THE OCIO WILL RETURN THE FORM TO THE AGENCY, REQUESTING IT BE COMPLETED.

If you have questions about the IT Request Form, please contact the Office of the Chief Information Officer (OCIO) at 777-5492 or ocio@wyo.gov. When submitting your IT Request Form for review and approval, please email it to, ocio@wyo.gov.

Reference Table

| Reference | Description |
|--|---|
| 1. Project Management Cycle | Illustrates the path an IT investment follows through its lifecycle and identifies the parties responsible for assisting and making recommendations on the various components in the project management cycle. |
| 2. Project Management Cycle Detail | Illustrates the individual deliverables and activities, which are conducted during the investment lifecycle. |
| 3. Information Technology (IT) Governance Model | Illustrates the IT Governance structure and processes used to make decisions about IT direction, needs, architecture, policies, and standards in the State of Wyoming's Executive Branch. |
| 4. IT Investment Review Criteria | A reference for a management team to determine at what point an IT investment will start in the review and approval process. |
| 5. Agency Project Preparation Checklist | Checklist to help guide the Agency through the discovery stage of the project. The majority of the questions will apply- regardless of the project size and may even generate other matters or opportunities that the Agency chooses to investigate before proceeding with the project. |
| 6. Business Case Review Cover Sheet | Primary tracking form for the various evaluation groups. |
| 7. Business Case Template | Template to be used while writing a business case. |
| 8. Business Case Review Checklist | Checklist for the Project Analysis & Support Subcommittee and a self-evaluation. |
| 9. Business Case Executive Summary Checklist | Checklist for the ITPC and for developing the executive summary |
| 10. Business Case Review Process | Illustrates the path a business case follows through the review process. |
| 11. Request for Proposal Template for Technology Procurement | Template to aid an agency in developing an RFP |

| Reference | Description |
|--|---|
| 12. IT Request Form | The official OCIO form to collect financial information on all IT-related purchases; approve purchases of hardware, software, services and/or combinations and recommend budget requests (regardless of cost); and request new IT positions prior to making the exception budget request. |