



BUSINESS CASE CHECKLIST

for Arizona State Agencies

Arizona state agencies needing funding for transformation projects are required to submit a budget request to the **Governor's Office of Strategic Planning & Budgeting** (OSPB). Building a robust business case is a vital component of this decision package.

Additionally, for Information Technology (IT) projects that cost \$25,000 or more, the agency is required to work with their assigned Arizona Dept of Administration - Strategic Enterprise Technology (ADOA-ASET) Engagement Manager, to evaluate the project and submit a Project Investment Justification (PIJ) for approval by the ASET Oversight team. The PIJ gathers information to build a business case.

Creation of the OSPB decision package and the PIJ are complex endeavors that require a thorough understanding of the business need, current state gaps and impacts, future state business requirements, recommended solution, and future state benefit and cost analysis.

Use the checklist on the following page to understand your readiness to complete a PIJ and build an OSPB decision package for your project. This is not an exhaustive list. However, if you can provide all the information on the checklist you are well-positioned to proceed with the development of the budget request and submitting a PIJ.

Connect with us to learn about MSSBTA's approach to formulating your business case and tracking business value.

Advisory@mssbta.com or 602-387-2100

Approved Vendor State Consulting Services Contracts:
ADSPO 17-171753, # AR2488 SHI NASPO, Knowledge Services Master Services Agreement

Approved Vendor Maricopa County Consulting Services Contract: # 171074-S

Qualified Vendor List City of Phoenix: # 151507 / RFQu 20-031

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Business Case PIJ and Decision Package Checklist

Use the following checklist to understand your readiness to complete a PIJ and build an OSPB decision package for your project.

- Operational issue or business need with impact on agency mission and goals
- Comprehensive list of functional/non-functional business requirements from internal, external stakeholders (performance, data migration, usability, security, privacy requirements)
- Prioritize requirements into Must-Have, Important-to-Have, and Nice-to-Have
- Current state gap analysis and impact assessment
- Proposed solution and how it addresses the business need
- Proposed technical architecture with documented criteria for selection
- Project road map with critical milestones. Include vendor assessment, selection, training
- Up-front project costs, e.g., hardware, initial software licenses, training, taxes etc.
- Ongoing support costs for sustaining proposed solution over 5-year lifecycle, e.g., ongoing vendor hosting, annual maintenance and support not acquired, disaster recovery etc.
- Quantitative/qualitative benefits of proposed solution, including ROI
- Hardware procurement strategy plan if project requires servers, laptops, peripherals etc.
- High-level resource and skills plan, including implementation partners, vendors, and others
- Funding sources with contingency plans

If there are gaps in the information you need to create a compelling budget request or PIJ, please contact MSSBTA. We have assisted several Arizona state agencies through this process and would be delighted to develop these deliverables for your agency.

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