Project Request Due Diligence Form

Project Request Name

Submitted by:

Date:

# *Instructions to Complete this Form*

1. The objective of this form is to help a Requestor document a request for a new project or a modification to an existing application and to provide the Directors information to make an informed decision whether to move forward or discontinue the requested effort. By completing this document, requestors will be able to establish validity for the request in determining the direction to be taken, the resources to be assigned, and the timeframe in which the request needs to be completed.
2. Requests for modifications to existing applications, new reports, or new projects should never be submitted to Division of Technology & Innovation (DTI) Help Desk or to the Business Analysts without first receiving executive approval.
3. Consider the difference between an RFS and a Project Request.
4. **Request for Service (RFS)**

An RFS reflects a need to have something fixed. It is not a new project request, project enhancement, or modification to an existing application; rather it is a collection of activities that involve: Technical issues, Break/Fixes, Equipment fixes or replacements (i.e. new computer, telephone, etc.). An RFS request can be submitted directly to the DTI Help Desk for resolution

1. **Project Request**

A Project Request includes any request for a new application, an enhancement to an existing application, or a request that involves development of any sort. It is not a Technical issue, Break/Fix, or a replace/fix of equipment. *A project request could be to develop either a technical or non-technical solution for a new business process. A Project Request shall be subject to the Project Management Methodology.*

1. This template can be modified for each specific request. The sections provided are standard and the categories can be expanded to additional pages. If preferred, the requestor can also indicate in a specific section that the information is included on an additional page or in an exhibit attached to the packet. If a section does not apply to the request, please indicate “Not Applicable” in the section.
2. Before submitting the form, remove the “Instructions to Complete this Form” page and the instructions from each section in this form. Instructions are in blue font.
3. Once completed, the form shall be submitted to the requestor’s assigned Administrator to be then sent to a Director for review and possible submission for executive approval.
4. A flow-chart detailing how a project is captured, reviewed, and prioritized is included at the end of this document.
5. It is important to note that a submitted request will not automatically be approved, and an approved project may be delayed. Project scheduling is based upon many factors, including:
* Priority, when compared with other active or pending projects
* Available resources on the Business and Technical teams
* Identified need for further research or justification for the request

# General Project Request Submission Information

|  |  |
| --- | --- |
| Title of Request: | **Project Request Name** |
| Assigned Director Sponsor: |  |
| Is this a New Project Request? | [ ]  Yes | [ ]  No |
| Is this a modification to an existing application? | [ ]  Yes | [ ]  No |
| If yes, which application is to be modified? |  |
| Is this request necessary to fulfill a new mandate or regulatory requirement? | [ ]  Yes | [ ]  No |
| If yes, cite statute, local rule, or administrative order: |  |
| Effective Date of mandate or regulatory requirement: |  |

# Issue or Opportunity Statement

Describe what the issue or opportunity for improvement is for which this request is being submitted.

Issue/Opportunity Statement: What is the current issue that this request will resolve? Or what and how will a business process be improved with this request?

<Statement here>

# Expected Outcomes and Benefits

A successful solution would:

| Item # | Outcomes / Benefits  |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Volume

If the request is to transition a paper process to an electronic process, indicate the monthly/yearly volume that will be affected.

<Insert volume statements or tables here>

# Impact of Deferral

What are the impacts to the office of not executing? What will the impact be to our customers (internal and/or external) if the project isn’t completed? Please be specific.

<Risk of not implementing here >

# Stakeholders

Who will be impacted by and/or has a vested interest in the outcome of the proposed enhancement? List all direct and indirect Stakeholders and interested parties, both inside and outside the Clerk’s office. (This could possibly include additional systems connected with this project).

<List stakeholders here>

# Alternatives

What alternative business solutions have you considered in the event this request cannot be pursued?

<Alternatives here>

# Completion Time

Please define the sense of urgency behind this request. If there is an expected completion time, why must the project be completed within those time parameters?

<Completion time>

# Decision Summary

The purpose of this section is to communicate the decision by the Director to move forward or not with the official Project Proposal.

|  |  |
| --- | --- |
| Review Date: |  |
| Project Sponsor: |  |
| Project Requestor: |  |

| **Decision** |
| --- |
| **Approve Request. Move forward with Project Proposal.** |[ ]
| Postpone review until later date |[ ]
| Deny Request. Return to requestor for additional research. |[ ]
| Deny Request. Direct requestor to terminate effort |[ ]
| Sponsor Signature (PDF eSign docs) |[ ]
| Signature Date (MM/DD/YYYY) |[ ]
| Explanation of Action - Summary of Decision  |
|  |