



<Project Name>

Project Concept Statement

<Insert Project Logo here>

<Month, Year>

Use File/Properties/Custom to insert
title

July 2, 1997

Revision History

| REVISION HISTORY | | | |
|-------------------------|--------------------|--------------|---|
| REVISION/ WORKSITE # | DATE OF RELEASE | OWNER | SUMMARY OF CHANGES |
| SIDdocs 3269v3 | 07/30/2004 | SID - PMO | Initial Release |
| OSI Admin #5130 | 08/29/2008 | OSI - PMO | Major revisions made. Project Concept Statement tailoring guide information was incorporated into this template. |

Remove template revision history and insert current revision history.

Approvals

| NAME | ROLE | DATE |
|------|------|------|
| | | |

Insert Project Approvals here.

Template Instructions:

This template offers instructions, sample language, boilerplate language, and hyperlinks written in 12-point Arial font and distinguished by color, brackets, and italics as shown below:

- Instructions for using this template are written in purple bracketed text and describe how to complete this document. Delete instructions from the final version of this plan.
- *Sample language is written in red italic font and may be used, or modified, for completing sections of the plan. All red text should be replaced with project-specific information and the font changed to non-italicized black.*
- Standard boilerplate language has been developed for this plan. This standard language is written in black font and may be modified with permission from the OSI Project Management Office (PMO). Additional information may be added to the boilerplate language sections at the discretion of the project without PMO review.
- Hyperlinks are written in blue underlined text. To return to the original document after accessing a hyperlink, click on the back arrow in your browser's toolbar. The "File Download" dialog box will open. Click on "Open" to return to this document.

INTRODUCTION

The Project Concept Statement is the foundation for making the decision to initiate a project. It is a brief statement summarizing the purpose, approach, necessary resources, risks, and impacts of a proposed project/initiative. Executive management uses the concept statement to determine if the proposed project/initiative can be successful based on current resource availability, skill sets and timelines. If approved, the concept statement is used to create the Project Charter.

This template should be completed for each proposed project and reviewed by Office of Systems Integration (OSI) Executive Management to determine if OSI should take on the proposed project. It is a one-time document used for decision-making.

Complete the following sections based on current analysis and understanding. Emphasis should be placed on ability to successfully complete the project, probability of success and why OSI should accept the proposed project. Descriptions should be short and concise.

| Description of Proposed Project | |
|---|---|
| Provide a description of the Proposed Project | |
| Proposed Project Name: <insert proposed project name> | |
| Background: Describe the prime motivation for the project; e.g. the reasons the project was conceived | |
| Business Problem: One or two-line description of the business problem to be solved. | |
| Goal: One or two-line description of the desired outcome of the project. | |
| System Concept: Synopsis of project and system approach <u>as it is currently understood</u> . <i>A prime contractor will be hired to develop the custom software required for the project, and to provide the required hardware. A separate contractor will be hired to provide Business Process Reengineering, training and help desk services on behalf of the project office. The system will be housed at the local data center and utilize their existing network and telecommunications services. The users will access the new application through their existing Internet connections. There is no data to be converted since this will be a new application and service.</i> | |
| Justification/Benefits: Why should/must the project be started now? List reasons 1. 2. 3. | Consistent with: <insert section> Business Plan _____ Strategic Plan _____ Other _____ |
| Assumptions/Constraints: List assumptions and constraints 1. 2. | |
| Chance of Success | |

| | |
|--|---|
| Probability of Success: <input type="checkbox"/> High / <input type="checkbox"/> Medium / <input type="checkbox"/> Low (Check only one) | |
| Ability to Complete: <input type="checkbox"/> High / <input type="checkbox"/> Medium / <input type="checkbox"/> Low (Check only one) | |
| Known Risks to Project Success List risks | |
| 1. | |
| 2. | |
| Consequences of Not Performing Project: (include related or dependent projects) | |
| Under What Circumstances Should This Project be Halted? (e.g., over budget by \$xx, poor user feedback or buy-in, xx months over schedule, etc.) | |
| Resource Needs | |
| Resources Available: OSI Resources <input type="checkbox"/> Yes / <input type="checkbox"/> No / <input type="checkbox"/> Partial / <input type="checkbox"/> TBD Sponsor Res. : <input type="checkbox"/> Yes / <input type="checkbox"/> No / <input type="checkbox"/> Partial / <input type="checkbox"/> TBD | Special Resource/Skill Needs: (Describe below) |
| Estimated Cost: Source of Funding: | Estimated Start Date: Estimated End Date: |
| Tradeoffs: (M – Most Flexible, S – Somewhat Flexible, N – Not Flexible. Assign one letter to each item) Resources: ____ / Schedule: ____ / Scope: ____ | |
| Priority of this Project Compared to Current Portfolio: (why does this project take precedents over another?) | |
| Project Approach (if known) | |
| System Complexity: _____ System Business Hours: (e.g., 24x7, 9am-5pm) | |
| Architecture: <input type="checkbox"/> Mainframe / <input type="checkbox"/> Client-Server / <input type="checkbox"/> Web-Based | Num. of New Databases: |
| Technology: <input type="checkbox"/> New/ <input type="checkbox"/> New to Staff / <input type="checkbox"/> In-House Experience | Interfaces: <input type="checkbox"/> External / <input type="checkbox"/> Internal |
| Implementation: <input type="checkbox"/> Central Site / <input type="checkbox"/> Phased Roll-out | Num. of Sites: |
| M&O Support: <input type="checkbox"/> Contractor / <input type="checkbox"/> Data Center / <input type="checkbox"/> Project / <input type="checkbox"/> Returned to Sponsor | |

| Procurement Approach: (consult with OSI Procurement Center) | | Number of Procurements: | | | |
|---|--------------|---|---------------|-------------|--------------|
| Open Procurement? <input type="checkbox"/> Yes / <input type="checkbox"/> No | | Contract Type: <input type="checkbox"/> CMAS/ <input type="checkbox"/> MSA / <input type="checkbox"/> Competitive | | | |
| Delegated Procurement? <input type="checkbox"/> Yes / <input type="checkbox"/> No | | Payment Type: <input type="checkbox"/> Fixed Price/ <input type="checkbox"/> T&M / <input type="checkbox"/> Alternative | | | |
| Scope of Contract: <input type="checkbox"/> Development / <input type="checkbox"/> Implementation/ <input type="checkbox"/> M&O / <input type="checkbox"/> Other _____ | | | | | |
| Anticipated Length of Contract: _____ years / _____ extensions for _____ years | | | | | |
| Roles | | | | | |
| Organization <List known participants and their anticipated type of participation.> | Project Mgmt | Sponsor | User/ Clients | M&O Support | Stakeholders |
| Office of Systems Integration | X | | | X | |
| Department of Technology Services | | | | X | |
| CA Counties | | | X | | |
| Department of Finance | | | | | X |
| Department of General Services | | | | | X |
| Federal Agencies | | | | | X |
| < advocates > | | | | | X |
| < labor organizations > | | | | | X |