**Business Transformation proposal**

PROPOSAL\_NAME

**Purpose of this document**

* To enable anyone within the University to articulate the initial description of an improvement idea
* To enable a senior manager to endorse and submit a proposal for a potential project/programme to the business transformation board (BTB)
* To enable a senior manager to request resource to support the further development of the idea through to a mandate
* To allow the BTB to confirm approval, prioritisation and sponsorship.

**Document workflow**

1. Complete this document, including version information, ensuring the proposal title is solution agnostic (updates are saved with increments after the decimal point, e.g. v0.1, v0.2)
2. Pass to senior manager endorser for formal approval (sponsor approvals are saved with increments prior to the decimal point, e.g. v1.0, 2.0)
3. Senior manager endorser emails the completed form to businesstransformation@st-andrews.ac.uk
4. BTPO review the proposal and pass to BTB for consideration at next meeting. Submission dates can be found on the business transformation web pages: <http://www.st-andrews.ac.uk/business-transformation/portfolio/reporting/>
5. Once your proposal has been considered by BTB, the Business Transformation Portfolio Office (BTPO) will contact you with a decision.

**Revision history**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Position | Version  | Activity (update or approval details) | Date |
|  |  |  |  |  |
|  |  |  |  |  |

**1. Background**

State the reasons for this change proposal in terms of the issues you are trying to resolve or the opportunity you are trying to exploit. Please provide a description of the state/issues of the current business activity(ies) under review.

Insert background here…

From the list below, please select the primary driver behind the proposal:

* Compliance
* Service delivery improvement
* Revenue growth
* Cost reduction
* Treatment of operational risk
* Increased productivity.

 **2. Strategic alignment**

Please describe how the proposal fits with unit/school/business area objectives, indicating alignment with the University strategy. The University strategy may be viewed or downloaded here:

<http://www.st-andrews.ac.uk/about/governance/university-strategy/>

If the proposal does not support any specific elements of the University strategy, explain why it should be considered.

* Insert strategic alignment here…

**3. Outcomes**

Please provide a summary of the initiative’s intended outcomes – describing an initial vision for how the University will be improved. Outcomes should be written as statements of what the future business activity(ies) will look like when the initiative completes. A short bulleted list of outcomes should suffice.

* Insert outcomes here…

**4. Stakeholders**

From the list below please indicate the likely impact on your/other business areas:

* Impacts only your team
* Impacts only your school/unit
* Minor impacts to multiple schools/units
* Major impacts to multiple schools/units.

From the list below please indicate the likely impact on customers (e.g. current students, prospective students, tourists):

* No customer impact
* Awareness from customers
* Minor impact on/minor behaviour change from customer
* Major impact on/major behaviour change from customer.

From the list below please indicate the likely impact on suppliers and partners external to the University:

* No impact to external suppliers/partners
* Requires awareness from suppliers/partners
* Minor behaviour change from suppliers/partners
* Major behaviour change from suppliers/partners.

Please provide a list of all schools/units and customer/supplier/partner groups impacted:

* Insert here…

**5. Constraints (timescales and resources)**

Please specify when the outputs of this project/programme are required. If the project/programme is required within the next 24 months, please justify why this is the case with reference to the impact on the expected benefits/dis-benefits:

* Required in less than 12 months?
* Required in 12-18 months?
* Required in 19-24 months?
* No deadline.

If known, please specify any constraints around resources (e.g. people, funding). Please also confirm the operational budget available for funding this initiative:

* Insert constraints here…
* Insert operational budget available here…

***Do you require project/programme management and business analysis resource from the BTPO for the next stage of your project/programme i.e. further development of the idea through to an outline business case?***

* Yes / no (delete as appropriate)

***If ‘no’, please complete the table below indicating who is proposed to fulfil those roles, their FTE capacity and relevant training/experience to allow them to fulfil the proposed role:***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Role | Name | FTE capacity | Training | Experience |
| Programme / project manager |  |  |  |  |
| Business analyst |  |  |  |  |

**6. Benefits / dis-benefits**

Please state at a high level the nature of the anticipated benefits to be realised if the initiative’s intended outcomes are achieved. The primary driver categories can be used as a framework. Please also state any dis-benefits, even if in your view these are outweighed by the benefits. A short bulleted list should suffice.

* Insert benefits/dis-benefits here…

 **7. Risks**

Please state any risks that could impede the successful delivery of this project/programme. There is no need for formal risk analysis at this stage. A short bulleted list of key risks should suffice.

* Insert risks here…

 **8. Dependencies**

Please indicate any other projects/programmes that rely on this proposed project/programme, or any other projects/programmes upon which this proposed project/programme relies. A short bulleted list, indicating the direction of dependency, should suffice.

* Insert dependencies here…