**Business Case**

**THE DEVELOPMENT OF GUIDANCE AND COUNSELING SERVICES MANAGEMENT SYSTEM**

**January 2018**

**Table of Contents**

[1. Executive Summary 2](#_Toc332112078)

[1.1. Issue 2](#_Toc332112079)

[1.2. Anticipated Outcomes 2](#_Toc332112080)

[1.3. Recommendation 2](#_Toc332112081)

[1.4. Justification 3](#_Toc332112082)

[2. Business Case Analysis Team 3](#_Toc332112083)

[3. Problem Definition 4](#_Toc332112084)

[3.1. Problem Statement 4](#_Toc332112085)

[3.2. Organizational Impact 4](#_Toc332112086)

[3.3. Technology Migration 5](#_Toc332112087)

[4. Project Overview 5](#_Toc332112088)

[4.1. Project Description 5](#_Toc332112089)

[4.2. Goals and Objectives 6](#_Toc332112090)

[4.3. Project Performance 6](#_Toc332112091)

[4.4. Project Assumptions 6](#_Toc332112092)

[4.5. Project Constraints 7](#_Toc332112093)

[4.6. Major Project Milestones 7](#_Toc332112094)

[5. Strategic Alignment 7](#_Toc332112095)

[6. Cost Benefit Analysis 8](#_Toc332112096)

[7. Alternatives Analysis 8](#_Toc332112097)

[8. Approvals](#_Toc332112098)

# Executive Summary

This business case outlines how the Guidance and Counseling Services Management System will address current business concerns, the benefits of the project, and recommendations and justification of the project. The business case also discusses detailed project goals, performance measures, assumptions, constraints, and alternative options.

## Issue

The Guidance and Counseling Services issue is the trouble of manual processing of services in the guidance office, the delay of weekly and monthly reports, up-to-date students’ profiles and the tracking of student records.

## Anticipated Outcomes

This project will benefit the Guidance and Counseling Office a paperless environment and a more systemized file holding and data recording for student transactions, services such as counseling and guidance. It will help the counselor to easily monitor and have an updated profiles of students.

## Recommendation

## Justification

Having a management system for the data and files tracking, systemized reports and up-to-date student’s profile will result in greater efficiency with regards to department resources and transaction processes. The development of Guidance and Counseling Services Management System Project was selected for proposal in this business case because it provides the best solution for the clients’ issues and needs. Aside from being useful, it will also allow the client to have a more systemized and functional transactions. The G&CSMS Project is also aligned with corporate strategy and objectives since it uses technology to improve the way we do business.

Initial estimates for the project are:

* 30% immediate up-to-date tracks of the students’ profiles
* 40% immediate decrease in time to generate weekly and monthly services reports
* 15% complete students’ data in less than 12months

15% accuracy of remarks and transactions

# Business Case Analysis Team

The following individuals comprise the business case analysis team. They are responsible for the analysis and creation of the G&CSMS Project business case.

| **Role** | **Description** | **Name/Title** |
| --- | --- | --- |
| Executive Sponsor | Provide executive support for the project | John Roi Manalansan, VP Operations |
| Technology Support | Provides all technology support for the project | Vincent Ian Montes, VP Information Technology |
| Process Improvement | Advises team on process improvement techniques | Francheska Ronquillo, Process Team Lead |
| Project Manager | Manages the business case and project team | Malene Dizon, Project Manager |
| Software Support | Provides all software support for the project | Oliven Tiu, Software Group Lead |

# Problem Definition

## Problem Statement

Since the beginning, Guidance Counselor keeps all the record on papers. The problem stated is that the Guidance Counselor have difficulties in keeping and browsing the records since all of it must be found manually through papers. With this problem that being encountered, process takes a lot of time and may sometimes lead to unrecorded data.

Reporting is another problem area associated with the paper document environment. All weekly and monthly records must be generated manually which allows for a high probability of error and require significant amounts of time. These manual tasks further add to the burden and expense of the company.

## Organizational Impact

The Guidance and Counseling Management System Project will impact the PUPQC in several ways. The following provides a high-level explanation of how the organization, tools, processes, and roles and responsibilities will be affected as a result of the Guidance and Counseling Management System Project implementation:

Tools: the existing paper environment will be minimal as the Guidance and Counseling Management System Project is stood up and becomes operational. This will require training the user on the Guidance and Counseling Management System tools and their use in support of other organizational tools.

Processes: with the Guidance and Counseling Management System Project comes more efficient and streamlined administration and processes. This improved efficiency will lessen the burden on the Guidance Conselor in managing records.

Roles and Responsibilities: in addition to the Guidance and Counseling Management System Project allowing greater autonomy and less-burden on the Guidance Counselor, the manpower required will be minimal. The new platform will be managed by the IT group and we do not anticipate any changes to IT staffing requirements.

Hardware/Software: The number of servers is not recommended for addition of hardware, instead, monthly to yearly check for maintenance is required to ensure system functionality for the following years. And if necessary, upgrade and replication of hardware components is prescribed.

## Technology Migration

In order to effectively migrate existing data from the manual records to the new automated management information system platform, a phased approach has been developed. The following is a high-level overview of the phased approach:

Phase I: The G&CSMS will be installed in the current Guidance and Counseling Services Office and tested by the developers and the Counselor.

Phase II: The office will purchase an external storage for the back-ups of files.

Phase III: The system will generate the students’ data from the source and if not possible a person entitled will encode some of the information.

Phase IV: After the encoding, the counselor and the assistant will have a semi-training/briefing on the systems core functionalities.

Phase V: The system will be ready to use and go live.

# Project Overview

The Guidance and Counseling Services Management System overview provides detail for how this project will address its business problem. The overview consists of a project description, goals and objectives for the G&CSMS Project, project performance criteria, project assumptions, constraints, and major milestones. As the project is approved and moves forward, each of these components will be expanded to include a greater level of detail in working toward the project plan.

## Project Description

The Guidance and Counseling Services Management System will review and analyze several potential products to replace the current manual processing of documents with an automated management platform. This will be done by determining and selecting a solution which adequately transform the current manual processes and still allows for growth in the succeeding years. Once selected, the project will be initialized in a phased implementation approach and be completed once the new system is operational and live.

The project aims for greater efficiency of day to day or weekly reports, up-to-date data and systemized transactions as a result of providing the administrator with a systemized environment.

This project will benefit the department of the Student Affairs and its subordinates especially the Guidance Office for a more accurate and fast weekly and monthly reports.

## Goals and Objectives

The Guidance and Counseling Services Management System directly supports several of the corporate goals and objectives established by different Guidance and Counseling Offices of the Polytechnic University of the Philippines Branches and Satellite Campuses. The following table lists the business goals and objectives that the G&CSMS supports:

| **Business Goal/Objective** | **Description** |
| --- | --- |
| Timely and accurate reporting | Automated tool will allow real-time and accurate reporting of all system transactions |
| Up-to-data data | The department will have an up-to-date data of the students’ profiles targeting one of the main issues of the office |
| Reduce Duplication | This allows the counselor to keep track of the remarks and transactions and will lessen the duplications |
| Faster Transactions | With an automated system, the transaction inside the Guidance and Counseling Services Office will be faster |

## Project Performance

The following table lists the key resources, processes, or services and their anticipated business outcomes in measuring the performance of the project. These performance measures will be quantified and further defined in the detailed project plan.

| **Key Resource/Process/Service** | **Performance Measure** |
| --- | --- |
| Reporting | The automated management information system will reduce reporting discrepancies (duplicates and gaps) and require reconciliation every 6 months instead of monthly. |
| Admin data entry | Eliminate counselors’ non-billable work by allowing administrative staff to enter data allowed by the student except for other information that are stated in an agreement between the counselor and student. |
| Software and System Maintenance | Decrease in cost and staff requirements as system maintenance will be reduced from once every month to once every 6 months with the new system. |

## Project Assumptions

The following assumptions apply to the G&CSMS. As the layout of the project begins and more assumptions are identified, they will be added accordingly.

* The administrator and other involved personnel will be trained accordingly in their respective data entry, timesheet, and reporting tasks on the new MS-based system
* Funding is available for training if needed.
* Funding is available for purchasing hardware/software for the MS-based system
* Resource support such as Books, Manuals and Tutorials will be provided by the Guidance and Counseling
* Project has executive-level support and backing
* Project will have a transition period and adjustment period

## Project Constraints

The following constraints apply to the G&CMS. As the layout of the project begins and more assumptions are identified, they will be added accordingly.

* There are limited IT resources available to support the G&CMS Project and other, ongoing, IT initiatives.
* There are a limited number of commercial off the shelf (COTS) products to support the G&CMS.
* As implementation will be done internally and not by the product developers or vendors, there will be limited support from the hardware/software providers.
* Some paper records may be lost due to wear and tear.
* The balance of needs between Professor and Student needs for the system.

## Major Project Milestones

The following are the major project milestones identified at this time. As the project planning moves forward and the schedule is developed, the milestones and their target completion dates will be modified, adjusted, and finalized as necessary to establish the baseline schedule.

| **Milestones/Deliverables** | **Target Date** |
| --- | --- |
| Project Charter | 01/04/2018 |
| Project Plan Review and Completion | 02/01/2018 |
| Project Kickoff | 02/28/2018 |
| Phase I Complete | 03/01/2018 |
| Phase II Complete | 03/20/2018 |
| Phase III Complete | 03/31/2018 |
| Phase IV Complete | 04/25/2018 |
| Phase V Complete | 06/10/2018 |
| Closeout/Project Completion | 08/31/2018 |

# Strategic Alignment

The Guidance and Counseling Management System Project is in direct support of several of PUPQC Plans. By directly supporting these strategic plans, this project will improve our business and help move the company forward to the next level of maturity.

| **Plan** | **Goals/Objectives** | **Relationship to Project** |
| --- | --- | --- |
| 20xx PUPQC Guidance and Counseling Management Plan of Record keeping | Improve record keeping and information management | This project will allow proper record keeping of the students and accurate data entry. |
| 20xx PUPQC Guidance and Counseling Management Strategic Plan for the system Users | An open briefing for the future users of the system. Expected: Counselors and their assistants | This project will allow the users to be well informed about the systems functions and processes. |

# Cost Benefit Analysis

The following table captures the cost and savings actions associated with the G&CSMS Project, descriptions of these actions, and the costs or savings associated with them through the first year. At the bottom of the chart is the net savings for the first year of the project.

| **Action** | **Action Type** | **Description** | **First year costs (- indicates anticipated savings)** |
| --- | --- | --- | --- |
| Purchase Automated management information system product and licenses | Cost | Initial investment for G&CSMS | ₱10,000.00 |
| Software installation and training | Cost | Cost for IT group to install new software and for the training group to train the users, event place and other financial expense. | ₱15,000.00 |

Based on the cost benefit analysis above we see that the system will not have any financial benefits for the Guidance and Counseling Services Office. The costs of the projected actions are negotiable.

# Alternatives Analysis\*

The following alternative options have been considered to address the business problem. These alternatives were not selected for a number of reasons which are also explained below.

| **No Project (Status Quo)** | **Reasons For Not Selecting Alternative** |
| --- | --- |
| Keep the mainframe legacy system in place | * Unnecessary expenditure of funds for increased staffing levels * Continued occurrence of a high number of data errors * Poor and untimely reporting * Lack of automation |
| **Alternative Option** | **Reasons For Not Selecting Alternative** |
| Outsource the implementation of a automated management information system platform | * Significantly higher cost * Expertise already exists in house * Vendor’s lack of familiarity with our internal requirements |
| **Alternative Option** | **Reasons For Not Selecting Alternative** |
| Develop software internally | * Lack of qualified resources * Significant cost associated with software design * Timeframe required is too long |