|  |
| --- |
| University of Glasgow logo |

Part 1: Project Title Executive Summary

|  |  |
| --- | --- |
| **Overview** | **Funding** |
| Presented to: |  | Investment funding type: | **Choose an item.** |
| Date: |  | Investment Plan (IP) funding source: | **Choose an item.** |
| Sponsored by: |  | How much is funded externally? | **£** |
| Submitted by: |  | What is the total amount in the IP? | **£** |
| Delivered by: | College or function | How much has been approved against the IP? | **£** |
| Financial review by: |  | How much has been spent to date on this project? | **£** |
| DCF included? | YES/NO/NA | What is the remaining spend? | **£** |
| Agresso code (if known): |  | How much has been included for contingency? | **£** |
| Has VAT been included? | YES/NO/NA |
| Prioritisation category  | (completed by Finance) | VAT total | **£** |
| **Funding requested to date:** | **£** |
| **Funding request in this submission:** | **£** |
| **The total estimated cost is:** | **£** |

## Vision Statement

Summarise the project in less than 100 words**.** This statement is used in presentations and reports, so it needs to be short. Over 100 words will be truncated and may lose essential information. Greater detail can be added in sections 5 and 6 of this document. Consider the length of this paragraph as a good indication of length. Replace this text with your own project summary. **The Submission Form must not exceed 3 pages as it used in paper collation and reporting.**

## Project summary

**Without exceeding the 3-page limit** for the executive summary, summarise the need for this investment, the impact it will have and how you will approach delivery. Greater detail can be given in sections 6 and 7 of this document. The purpose of this section to give those approving the investment an immediate overview and to use as a comparator with other submissions.

## Why is this important?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Health & Safety/ Regulatory | Business Continuity | Sustainability | Strategic Alignment | Capability & Competition |
| Click to choose | Click to choose | Click to choose | Click to choose | Click to choose |

## How does this contribute to our strategy?

|  |  |
| --- | --- |
| Strategy and theme | Contribution to strategy  |
| PRIMARY STRATEGY: Click to choose | PRIMARY OBJECTIVE: Click to choose |
| Additional notes on strategy | Free form text to give further context to how this investment contributes to strategy |

## What is(are) the key deliverable(s) for this investment and what value will this add?

|  |  |  |
| --- | --- | --- |
| Deliverables Summary Heading  | Deliverables Summary Description | All deliverables complete by |
|  |  |  |
| Cost description | Cost heading | £ |
|  | **Choose an item.** |  |
| Insert additional rows as required (delete this row if not required) | **Choose an item.** |  |
| **TOTAL** |  |
| This will result in an improvement to | Measured as a/an | From (baseline) | On this date | To (target) | By this FY |
| Click to choose | **Minimum of 1 benefit** |  |  |  |  |
| Click to choose |  |  |  |  |  |
| Click to choose | **Maximum of 15 benefits** |  |  |  |  |
| Non measurable benefits | Description |
|  |  |
|  | Insert additional rows as required (delete this text) |

**DO NOT EXCEED 3 PAGES (delete this text)**

Part 2: Project title Business case

## Project background

Freeform text and images. (Delete this text).

## Project objectives

Freeform text and images. (Delete this text).

## Impact

|  |  |  |  |
| --- | --- | --- | --- |
| Measurement from table in section 5 | Will (primarily) contribute to this strategic objective | Will (primarily) contribute to this UofG KPI | Will (primarily) contribute to this Performance Indicator |
| **Minimum 1 benefit measurement** | Click to choose | Click to choose | Free text |
|  |  |  |  |
| **Maximum 15 benefit measurements** |  |  |  |

## Milestone and goal planning

|  |  |
| --- | --- |
| Milestone or goal | Date |
| Gate 2: Optional Funding Required (business case approval date) | mandatory |
| Gate 3: Decision to Invest (business case approval date) | mandatory |
| Gate 4: Readiness Checkpoint (final handover date) | mandatory |
| Gate 5: Benefits Realisation (final date) | mandatory |
| Major milestone/goal | optional |
| Major milestone /goal | optional |
| Paste additional rows as required (delete this row) |  |

## Options considered

|  |  |
| --- | --- |
| Option | Description |
| Do nothing |  |
| Preferred option |  |
| Alternative 1 |  |
| Alternative 2 | Insert additional rows as required (delete this text) |

## External Funding

|  |  |
| --- | --- |
| Are there external funds available? | YES/NO/NA |
| Grant or other funding details | Delete remainder of table if NO |
| Funding additional notes |  |

## Estates approval

|  |  |
| --- | --- |
| Is there an Estates element? | YES/NO. Delete remainder of table if no |
| Building(s) |  | Room(s) |  |
| Statutory Approvals | Click to choose |
| Equipment Cost |  | Estates Cost |  |
| Estates Contact | College equipment applications only. Delete this row if not applicable |

## Sustainability impact approval

|  |  |
| --- | --- |
| Is there an impact on our sustainability (direct or indirect) (sections 3 and 4 of submission form) | YES/NO/NA |
| If yes, has a Sustainability Project Form (SPF) been submitted to Estates and added to appendices? | YES/NO |
| SPF notes  | Delete this and above row if no impact |

## Procurement approval

|  |  |
| --- | --- |
| Does Procurement need to be involved? | YES/NO |
| Supplier and costs | Delete remainder of table if NO | £ |
| Alternative suppliers researched and costs |  | £ |
| Procurement additional notes |  |

## Technology approval

|  |  |  |
| --- | --- | --- |
| Are there technology elements to this investment? | YES/NO | If yes, enter IS contact |
| Technology summary | Delete remainder of table if NO |
| Technology costs |  | £ |
| Technology additional notes  | Further notes provided by IS contact |

## Data validation

|  |  |
| --- | --- |
| Was a Data Protection Impact Assessment Form required? | YES/NO |
| Was Planning Insights and Analytics involved in the benefits data? | YES/NO |
| If yes, what was the outcome | Delete this row if answer is no |
| If no, what was the reason? | Delete this row if the answer is yes |
| PIA additional notes  |  |

## Delivery approach and governance

|  |  |
| --- | --- |
| Project Sponsor |  |
| Project Manager |  |
| Additional resources identified/required: Name and role | Availability |
| These are resources to deliver the project, not the team required after go-live | YES/NO |
| Continue to insert a row below for each additional resource | YES/NO |
| If appropriate, add an organisation chart into the appendices | YES/NO |
| Project Workflow (PPMA) | click to choose workflow |
| Project Governance  | Who will oversee the project during delivery? |
| Additional information  |  |

## Risks, Assumptions, Constraints and Dependencies

|  |  |  |
| --- | --- | --- |
|  | Description | Mitigation/Comment |
| Risk 2 |  |  |
| Risk 2 |  |  |
| Risk 3 |  | Continue to insert a row below for each additional risk |
| Assumptions |  | Continue to insert a row below for each additional assumption |
| Constraints |  | Continue to insert a row below for each additional constraint |
| Dependencies |  | Continue to insert a row below for each additional dependency |

## Reviewed and pre-approved by

|  |  |
| --- | --- |
| Name of business partner who has reviewed this project | Meeting or email date |
| Project Sponsor (mandatory) insert name |  |
| Head of Finance (mandatory) Click to choose |  |
| Estates business partner (optional delete if not applicable) |  |
| Procurement business partner (optional delete if not applicable) |  |
| Information Services business partner (optional delete if not applicable) |  |
| Planning, Insights and Analytics business partner (optional delete if not applicable) |  |
| Other(s) | For example, Committee or Board (optional delete if not applicable) |  |

Appendices

## Appendix 1:

## Appendix 2: