**Text

Description automatically generatedBusiness Case (>£3m)**

**[Project / Investment Title]**

**Funding Requested: [insert amount]**

**Presented to: [insert governance body]**

**Sponsor: [insert sponsor name]**

**Author: [insert author name]**

|  |
| --- |
| **EXECUTIVE SUMMARY** |

Project Overview

|  |  |
| --- | --- |
| Project / Investment Plan Code |  |
| Submission Date | Click or tap to enter a date. |
| Submission Type | Click to choose |
| Delivered By | *Choose an item.* |
| Stage and Next Gate | Choose an item. and Choose an item. |

Project Summary

|  |
| --- |
| Details on what will be delivered (max 500 words) |
|  |

Change Request Summary (when submitting for additional funds)

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| --- |
| Why additional spend is required (max 500 words) including impact to benefits and timescales |
|  |

Financial Overview

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Investment Plan Funding Source | Amount already approved | Additional amount requested now | Total amount requested to date | Total per Investment Plan | External  Funding |
| Choose an item. | X | Y | X + Y |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Type of Spend / Cost Category | Costs incurred to date | Costs to complete | Total project costs |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| TOTAL |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Timing | Current Year | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6+ |
| Total Spend |  |  |  |  |  |  |  |

Benefits Overview

|  |  |
| --- | --- |
| Primary Benefit | |
| Type / Outcome | Choose an item. |
| Description |  |
| Owner |  |
| Value |  |
| Direct financial impact | Choose an item. |
| How will this be measured? |  |
| Timing |  |

|  |  |
| --- | --- |
| Primary Benefit | |
| Type / Outcome | Choose an item. |
| Description |  |
| Owner |  |
| Value |  |
| Direct financial impact | Choose an item. |
| How will this be measured? |  |
| Timing |  |

|  |  |
| --- | --- |
| Primary Benefit | |
| Type / Outcome | Choose an item. |
| Description |  |
| Owner |  |
| Value |  |
| Direct financial impact | Choose an item. |
| How will this be measured? |  |
| Timing |  |

NB Additional benefit tables may be added up to a maximum of 7

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Timing | Current Year | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6+ |
| Total Financial Benefits |  |  |  |  |  |  |  |

Strategic Alignment

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| --- | --- |
| Main strategic theme | Click to choose |
| Additional strategic themes | Add in additional strategic themes |

Prioritisation

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| --- | --- | --- | --- | --- |
| 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 |

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| --- |
| Please give further details of the impact this investment will have on sustainability |
|  |

Sustainability (Estates-only)

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| --- | --- | --- | --- | --- | --- | --- | --- |
| KPI | Embodied Carbon | Operational Carbon | Operational Energy | Water | Indoor Environment Quality | Waste | Other Environment |
| Target Being Set? | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| Why/ Why Not? |  |  |  |  |  |  |  |
| What is the Strategy? |  |  |  |  |  |  |  |

Equipment and Estates (if applicable)

|  |  |
| --- | --- |
| Equipment Cost | Click here to enter amount |
| Building/Location | Click or tap here to enter text. |
| Estates Cost | Click here to enter amount |
| Estates Investment Support Contact | Click here to enter name |
| Date sent to Estates  (for installation cost) | Click to enter date |

**Additional Information**

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| Any further relevant points |
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| Any further documentation presented as part of this application |
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**Approvals**

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| --- | --- |
| Approvals (Governance/Name) | Date |
| Head of College/COO & University Secretary | Click or tap to enter a date. |
| Finance Review | Click or tap to enter a date. |
| Procurement Review (if applicable) | Click or tap to enter a date. |
| Legal Review (if applicable) | Click or tap to enter a date. |
| Sponsor Review | Click or tap to enter a date. |
| Local Governance Review | Click or tap to enter a date. |
| Investment Committee Review | Click or tap to enter a date. |
| SMG Review (if applicable) | Click or tap to enter a date. |
| Finance Committee Sign Off | Click or tap to enter a date. |

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| **INTRODUCTION** |

# BACKGROUND AND CONTEXT

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# BUSINESS JUSTIFICATION

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# PROJECT OBJECTIVES

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**CASE**

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| **STRATEGIC CASE** |

# CONTRIBUTION TO STRATEGY

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# KEY PERFORMANCE INDICATORS

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| **ECONOMIC CASE** |

# SOLUTION DESIGN

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# OUTCOMES AND VALUE/IMPACT

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# OPTIONS APPRAISAL

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| **COMMERCIAL CASE** |

# PROCUREMENT APPROACH

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# FUNDING

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| **FINANCIAL CASE** |

# AFFORDABILITY

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| **MANAGEMENT CASE** |

# DELIVERY APPROACH AND GOVERNANCE

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# MILESTONE AND DELIVERY PLANNING

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# RISKS, ASSUMPTIONS, CONSTRAINTS AND DEPENDENCIES

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