THE UNIVERSITY OF LEEDS

CAPITAL GROUP

**SHORT FORM BUSINESS CASE FOR <INSERT TITLE OF INITIATIVE>**

*The attached Short Form Business Case is for <insert title>. The aim of the initiative is <insert brief description of the initiative aim(s)>. Capital Group is requested to approve the investment of <£xm>.*

**The need for investment**

1. Provide a brief summary of the initiative.

**Financial Information**

1. A financial summary is provided in the table below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Capital Cost (£k)** | **Recurrent Cost (£k)** | **Income (£k)** | **NPV (£k)** |
|  |  |  |  |

**Recommendations**

1. Conclusions and statement of what decision is being requested.

<INSERT NAME OF AUTHOR>

<INSERT ROLE TITLE OF AUTHOR>

ANNEX 1 Short Form Business Case

ANNEX 2 Financial Appraisal Document for Capital Cases (NPV)

ANNEX 1

**THE UNIVERSITY OF LEEDS**

**CAPITAL GROUP**

## SHORT FORM BUSINESS CASE

## (Initiative value up to £500,000)

|  |  |
| --- | --- |
| **Initiative Title** |  |
| **Initiative Code** |  |
| **Faculty/Service** |  |
| **Forecast Date for Approval** |  |

**Background**

* Explain the background to this initiative.
* Describe the problem we are addressing. Why do we need to change?
* What will be the benefits of the initiative? What will be improved and how will we measure this?

**Resource**

The following people have responsibility for this initiative:

|  |  |
| --- | --- |
| **Role** | **Name** |
| **Sponsor** |  |
| **Business Lead** |  |
| **Project Manager** |  |
| **Author** |  |

**Proposal**

* Please describe the scope of the solution that is being implemented.



**Timescale**

The initiative is forecast to meet the following key dates:

|  |  |
| --- | --- |
| **Key Date** | **Forecast Date** |
| Short Form Business Case Approval |  |
| Start Test and Deliver/Start on Site |  |
| Go Live/In Use |  |

**Financial**

* Complete the financial information in the tables below.
* Funding: enter the sources of funding for the initiative and the value, e.g. faculty funded, University Capital Programme.
* Financial values: enter the following:
	+ Capital cost and how this will be split over the current and future years.
	+ Recurrent cost: record any changes to the annual recurring costs that result from the project.

The initiative will be funded from the following source(s):

|  |  |
| --- | --- |
| **Funding Source** | **Value (£k)** |
|  |  |
|  |  |

The financial values of the initiative are shown in the table below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Financial Information** | **Year 1** | **Year 2** | **Year 3** | **Total** |
| **Capital Cost (£k)** |  |  |  |  |
| **Recurrent Cost (£k)** |  |  |  |  |
| **Total (£k)** |  |  |  |  |

**Recommendation**

Provide a recommendation to the approval body

**Approval**

* Record the date the document was reviewed and accepted in the table below.
* The document is approved by the person with the delegated authority to sign up to the value of the approval.

|  |  |  |
| --- | --- | --- |
| **Role** | **Name** | **Date of Review** |
| Sponsor |  |  |
| Faculty Finance Manager |  |  |
| Director of Estates |  |  |
| Head of Finance, Facilities Directorate |  |  |
| Head of Programme Management Office |  |  |

This document is approved by:

**Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Role:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This is template version 2.1

Ensure that you use the latest version of this template from the [website](https://facilitiesdirectorate.leeds.ac.uk/investment-appraisal/)