[Your logo here]

**Business Case**

Prepared by [title, name/s]

[Day, Month, yyyy]

**[Name of Proposed Project/Activity]**

| Provided to Board: | [Day, Month, yyyy] |
| --- | --- |
| Considered by Board | [Day, Month, yyyy] |
| Board determination | [Day, Month, yyyy] |
| Approved/ Not approved (please circle) | |
| Option approved: [insert name of option | |

| Board Chair  Name  Signature ­­­­­­­­­­­­­­­­­­  [Day, Month, yyyy] | Chair Executive Officer  Name  Signature  [Day, Month, yyyy] |
| --- | --- |

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## Executive Summary

[Provide a brief summary of the whole business case to provide the readers with the context and intent.]

For example: The Management team is recommending an increase in the number of service points. This business case explores four options to address [Organisational] risks and future growth. It includes information about the operating environment and market conditions in the context of our mission to provide services that support better outcomes for people with disability.

## Scope and objectives

[Describe the problem and what the business case is seeking to address.]

For example: The [Organisation] has outgrown its current premises. There are X more staff and X more customers using the premises. This poses a threat to the quality of services and customer and staff safety. Changes to the service model and pricing due to the NDIS represent a threat to market share and [Organisational] sustainability. The leadership team are recommending the purchase of an additional premise as a solution.

## Background and evidence

[Use this section to provide clear evidence about why the business change is needed.]

For example

* Include information about changes to the service model, systems or funding that have created the problem.
* What data is there that evidences the risks to the business
* Consider the role of your mission and values in the current market environment

## Options

[Use this section to outline the options. If you have limited the options, explain why the options have been limited.]

For example:

1. Do nothing
2. Purchase one property only
3. Purchase one property now and lease another property now
4. Purchase one property now and lease another property later

The option of leasing two properties is not considered viable for the following reasons….

## Risks and benefits of each option

[Use this section to provide an overview of the assessment of each and every option Explain how the assessment was undertaken, include your analysis. This section lays out the facts and does not preference any particular option.]

For example: The leadership team and senior managers considered the risks and consequences for each option including financial considerations, legal requirements, market, [Organisational] experience, timeframes etc. SWOT analysis was completed for each option and is provided below with some explanatory notes. The output of the risk assessment is included at Appendix A.

**Option 1. Do Nothing**

**Cost:**

[Describe the option in this subsection.]

For example: This option would see no change to the current business. The [Organisation] would continue to operate from the existing location with the existing staff and client base.

**SWOT analysis**

| Strengths | Weaknesses |
| --- | --- |
| Opportunities | Threats |

**Discussion**

[In this subsection, use simple sentences to explain the main risks of benefits of approving option drawn from the SWOT analysis.]

For example: The SWOT might consider impacts on quality, efficiency, working capital, resource requirements, timeliness of each option, cashflow, revenue, market share, customer experience, recruitment and retention, strategic direction or mission. You might also consider the impact on different stakeholders such as staff, clients, families, visitors or volunteers.

**Impact, and interdependencies**

[In this subsection describe what would need to be done to deliver the option and the business functions that would be affected. Include any assumptions. Record any issues that might impact on the successful delivery of the agree activity.]

For example: The Do Nothing option requires no action in terms of the premises but will require additional focus on risk with the Executive Managers required to report any concerns to the Board.

**Cost**

[Use this section to document the direct and indirect cost of the option. Include any contingencies.]

## Recommendation/s

[In this section identify the preferred option or prioritise a range of options which on balance could meet the business need. Explain the logic behind the recommendation.]

For example: The leadership team has considered the operating requirements of the [Organisation] and assessed the risks, benefits and limitations of each option. Based on the [Organisation’s] mission, strategic direction and current financial performance, Option X is the preferred option. It is likely to have the least impact on business as usual and is achievable within the anticipated timeframe. By comparison, option Y is high risk and could be costly.

## Appendices

[Attached supporting documentation]

For example: *Risk Assessment*