**Business Case Title:** Enter Business Case Title

For details and instructions on how to complete this document, click [ ¶ ] icon under Home tab to display hidden text.

**NOTES:**The business case will change throughout the project stages and should be updated at each of the following stages at a minimum:

1. Initial/Feasibility Business Case (FE)
2. Preliminary Design Business Case (PD)
3. Detailed Design Business Case (DD)
4. Post In-Service Business Case (Benefits Realization) (IS)

The project stage should be indicated in the document name: DATE-BUSINESS CASE NAME-STAGE.doc. Ex. 012720-New Road Project-DD.doc.

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| **Part 1: Signoff by Key Stakeholders** | | |
| ***Who was involved in the development of this business case?*** *This section contains the signoff of key stakeholders, indicating that they agree with the presentation or proposal as it appears in the business case. Signoff can be provided via email and indicated in the signature line and dated. At a minimum this should include the project sponsor, business case author, business owner, Finance & Administration, IT (if applicable), and PP&D for any building projects. Use tab to add additional lines.* | | |
| **TITLE** | **NAME** | **SIGNATURE** |
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| **Part 2: General Information** | |
| **Business Case Title** |  |
| **Business Case ID** |  |
| **Service** |  |
| **Division/Branch** |  |
| **Date Created** |  |
| **Date of Last Revision** |  |
| **Business Case Author** |  |
| **Class of Estimate** |  |
| **Program or Project?** |  |
| **Executive Summary/Investment Description** | |
| ***Provide a description of the investment.*** *Provide a concise executive summary (high level, plain language) that captures only the essential elements of the business case being presented. This will be used for the capital dashboard/capital detail sheet/public consumption. Limit to 250 words.* | |
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| **Part 3: Business Need & Desired Outcomes** |
| Organizational Overview |
| ***Where are we now, current Level of Service (LOS)?*** *Describe the*   * *Service – what is the service area and what are the objectives of this service area* * *Current Performance – outline the Customer and Technical Level of Service. If developed, include a screenshot or a summary of the Customer and Technical LOS performance measures from the LOS Framework.*   *Including this information will highlight the gap between the current performance and the target performance and build a strong rationale for the investment.* |
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| Business Need |
| ***Where do we want to be, proposed LOS?*** *Provide a detailed description of the business need. Include any LOS impacts here, specifically describing the proposed LOS target and risk reduction as a result of this investment. Provide supporting data and performance metrics* |
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| Lifecycle Activity |
| ***What is the lifecycle activity of the investment need?*** *Select ONE, primary Lifecycle Activity from the following list and provide explanation for why the particular activity was selected:*   * *Renewal - An activity to rehabilitate or replace an existing asset to restore equivalent quality, capacity or function. (e.g. replacement of water main or sewer main).* * *Upgrade - An activity to improve an existing asset to achieve enhanced fit for purpose, new strategic priorities or regulatory requirements (e.g. replacing existing fleet with electric vehicles and supporting infrastructure). Stipulate if the investment is fulfilling a regulatory upgrade (e.g. Repairs at a pool to address code compliance in order to maintain current levels of service)* * *Growth – An activity to provide a net new asset that did not exist previously or an expansion to an existing asset. (e.g. Widening/extending major route, or extend water supply to new development).* * *Operations & Maintenance – Regular activities to provide services which will consume resources (such as labour, energy, chemicals and materials) or are regular on-going activities necessary to keep assets operating, including instances where portions of the asset fail and need immediate repair to make the asset operational again (excluding renewal) (e.g. Test and inspect hydrants and water valves, or Transit preventative maintenance)* * *Disposal - Any activity associated with the offboarding of an asset including sale, demolition, or abandonment. Disposal of assets are not intended to be replaced by a similar asset after decommissioning (e.g. Decommissioning an indoor arena without the replacement of a like asset).*   *NOTE: If the investment does have partial costs associated with Disposal activities, please indicate the percentage of costs allocated to those activities.* |
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| Business Outcomes |
| ***What benefit(s) will this investment achieve?*** *Indicate the expected result(s) or benefit(s) to the organization, including risk reduction. Attempt to quantify where possible and/or consider potential metrics that could be used to measure the benefits realized following project close and the asset is put into service.*  *Refer to the benefit evaluation criteria in the Benefit Evaluation Procedure and indicate which categories are applicable. Provide supporting evidence for each relevant category.* |
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| Strategic Alignment |
| ***How does this investment contribute toward the goals and objectives of the organization?*** *Within this section reference OurWinnipeg, Strategic Priorities Action Plan (SPAP), and/or other City strategic and master plans. For example, if the option aligns with OurWinnipeg, indicate the specific objective and how the option aligns with that objective. If it aligns with the SPAP, indicate the theme and, where possible, the specific action item.* |
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| **Part 4: Detailed Description of the Business Need** |
| High Level Requirements |
| ***What are the high-level requirements to fully address the business need?*** *Detail the investment requirements (ex. bring building systems up to current code requirements, ensure asbestos remediation is completed prior to renovation).* ***For programs, provide a prioritized list of projects to be completed within the program during the current budget year.*** |
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| Assumptions |
| ***What are the assumptions associated with the ability to address the high-level requirements?*** *What is the impact of those assumptions if not addressed?* |
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| Constraints/Dependencies |
| ***Are there any specific constraints that place limits or conditions on the investment?*** *Are there any dependencies related to business need, requirements or solution?* |
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| Coordination/Synergies |
| ***Is coordination with other departments or external stakeholders (ex. utilities) required?*** *Explain the type and level of coordination with other stakeholders.* |
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| **Part 5: Options Analysis** | | | | | | | |
| ***What options are available to address this opportunity or need?*** *Complete the options analysis using the Net Present Value Template. Status quo (maintaining the current operations and maintenance behavior) must be considered. Copy the summary information into the following section. Options analysis completed by consultants must use the NPV template and this section of the business case must be completed.* | | | | | | | |
| **Option Number** | **Option Description** | **NPV Capex ($k)** | **NPV**  **Opex**  **($k)** | **NPV**  **($k)** | **Benefit Score** (in points) | **Cost/**  **Benefit** | **Cost/**  **Benefit Rank** |
| Option 1 |  |  |  |  |  |  |  |
| Option 2 |  |  |  |  |  |  |  |
| Option 3 |  |  |  |  |  |  |  |
| Option 4 |  |  |  |  |  |  |  |

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| **Part 6: Define the Proposed Solution** |
| ***Detail the proposed solution.*** *How does addressing the problem and/or opportunity benefit the City and/or service provided? Does the department have prior experience (lessons learned) addressing a similar problem or opportunity?* |
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| Rationale for Option Selection |
| ***Why was this option selected?*** *Provide support, particularly for selected options that do not have the best (lowest) cost benefit score.* |
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| Alignment with Desired Business Outcomes |
| ***How does this option align with the business outcomes described in Part 3?*** |
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| **Part 7: Scope** |
| In Scope |
| ***What is to be included in the scope of this investment?*** |
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| Out of Scope |
| ***What is excluded from the scope of this investment?*** |
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| Stakeholder Identification |
| ***What stakeholders should be considered?*** *Describe the stakeholder environment by considering the types of stakeholders and their specific roles in supporting the investment. This should include ALL relevant stakeholders, both internal and external, in addition to the key stakeholders listed in Part 1: Signoff by Key Stakeholders.* |
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| **Part 8: Financial Summary** | | | | | | | | | | | |
| ***What are the costs associated with the selected option?*** *Detailed cost information is to be provided in the Basis of Estimate specific to the investment. The potential funding section below may not be applicable to all business cases, but should be used to outline potential third party funding agreements where applicable. The summary should also show the funds that have already been approved in previous budgets to help capture the total cost of the investment.* | | | | | | | | | | | |
| **Total Investment Capital Cost** | |  | | | | | | | | | |
| **Potential Funding Sources** | |  | | | | | | | | | |
| **Previously approved budget** | |  | | | | | | | | | |
| **Capital Budget Authorization** | | | | | | | | | | | |
| Budget ($k) | 2024 | FORECAST | | | | | | | | | Total |
| 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
| Capex |  |  |  |  |  |  |  |  |  |  |  |
| Net Opex |  |  |  |  |  |  |  |  |  |  |  |

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| **Part 9: Management & Capacity** |
| Project Delivery Capacity |
| ***How will the project be delivered?*** *What project delivery method will be used? Are there resources available to deliver the project within the proposed timelines?* |
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| Outcome Management Strategy |
| ***How will the business outcomes and benefits of the investment be tracked?*** *Describe the approach that will be taken to track and report outcome management/ benefit realization.* |
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**Appendices**

*Include any supporting documentation in the appendices. This includes, but is not limited to:*

* *Functional Programs*
* *Concept Drawings*
* *Public Engagement Plans*
* *Project Management Documents:*
  + *Stakeholder Assessment & Communication Plan*
    - *Stakeholder Assessment Tab*
  + *Risk Management Plan*
* *Approvals*

**Attachment(s)**

*Enter the title(s) of attached documents.*