**Outline Business Case**

This template should be completed by organisations that wish to be considered for potential capital investment made available through Dorset Local Enterprise Partnership (LEP) as part of a call for pipeline projects. Details about our latest call for project proposals can be found on our website: [www.dorsetlep.co.uk/project-proposals](http://www.dorsetlep.co.uk/project-proposals).

**This call for proposals is not linked to any specific capital funding from Dorset LEP. It is part of a rolling initiative to support investment opportunities across the region.**

Before submitting your outline business case, we recommend you use this below checklist to help determine if this process might be right for your project. Entering ‘no’ does not automatically mean that your outline business case will be unsuccessful. If you have questions about the application process, please email: DorsetLEPProgrammeManagementTeam@bournemouth.ac.uk

**Submission deadline**

Please submit your outline business case related to **Healthy Ageing and Low Carbon Energy Infrastructure** via email toDorsetLEPProgrammeManagementTeam@bournemouth.ac.uk **by 09:00 on 5 October 2021.**

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| **PROJECT CHECKLIST** | **Yes** | **No** |
| This project requires capital funding (minimum £2 million) |  |  |
| There is an agreed design and detailed cost breakdown in place for the project  |  |  |
| The relevant legal and planning consents (if applicable) are in place or are expected in time for project start date |  |  |
| The project benefits Dorset / economic benefit is in Dorset  |  |  |
| This organisation has not bid to Dorset LEP before with this project |  |  |
| This project has 30% match funding (capital/revenue/in-kind) through private/ company/organisation funds |  |  |
| This project is related to another Dorset LEP/Dorset County/wider projects |  |  |
| This project is linked to the Dorset Local Industrial Strategy / Dorset Living Well Investment Prospectus / Dorset Low Carbon Investment Opportunities / Build Back Better |  |  |
| This project is linked to the priority under this specific funding call: One Health – ageing population (including digital health) |  |  |
| This project is linked to the priority under this specific funding call: Low Carbon Energy Infrastructure |  |  |
| The required approvals/permissions/consents can be obtained in time to deliver the project |  |  |
| There is/will be a dedicated Programme Manager in place to deliver this project |  |  |
| Your organisation has a sound delivery track record to deliver projects on time & budget |  |  |
| Subsidy control – does the funding/measure meet the definition of a subsidy [Subsidy control guidance](https://www.gov.uk/government/publications/complying-with-the-uks-international-obligations-on-subsidy-control-guidance-for-public-authorities/technical-guidance-on-the-uks-international-subsidy-control-commitments). |  |  |
| Subsidy control – if the measure meets the definition of a subsidy, is the proposed measure a prohibited subsidy?  |  |  |
| EU State aid rules will continue to apply to the UK in respect of measures which affect trade in goods and electricity between NI and the EU. [Northern Ireland Protocol](https://www.gov.uk/government/publications/complying-with-the-uks-international-obligations-on-subsidy-control-guidance-for-public-authorities/technical-guidance-on-the-uks-international-subsidy-control-commitments#section-6). Is this applicable to this project?  |  |  |

**Outline Business Case – Project Details**

Please first provide a summary of your proposed project before completing Sections A-E below.

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| **PROPOSED PROJECT** |
| **Date of submission** |
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| **Project name** |
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| **Applicant’s organisation & address** |
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| **Main project contact & contact details**  |
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| **Project location** Please provide full address of the project location |
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| **Project partners/collaborators**  |
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| **Project budget & funding request**Summary breakdown of capital funding required, any match-funding (revenue & capital), in-kind funding & total project cost. |
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| **Project start date**Please also provide a summary of duration, cost & deliverables/key milestones. If there are scalable options, please provide different durations & funds associated. This can also be addressed in more detail under ‘Section B – Business Options’ below.  |
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| **Project end date**Project end date indicating the month in which you expect to receive the last drawdown payment. If this date differs from the practical completion of the project (i.e. project being continued to be delivered through match-funding), then please also provide the practical completion date.  |
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| **Collaboration/partnership** Is any other organisation directly involved in the delivery of the project? If yes, provide a list and a short description of their involvement in the project delivery. |
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| **Project description summary**Please provide a brief summary description of the overall proposed project / scheme, highlighting how the proportion of the requested capital funding and any other additional funding will be used to achieve the project’s objectives.  |
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| **Approvals/consent key requirements & timelines**What permissions and consents are necessary to carry out your project? If any, have they been obtained, if not, when will these be obtained (i.e. planning, permits, land purchase, procurement finalisation, etc.) Please ensure you have allowed enough time to obtain any approvals/planning, etc. as these can take months to obtain. We suggest you build time contingency around these into your project plan to mitigate delays. |
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| **List all permissions and consents required below.**  | **Have they been obtained?** **YES / NO** | **If YES, provide the date received (mm/yyyy)****If NO, provide the date expected (mm/yyyy)** |

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| **Project ‘drop dead date’/dependencies**At which point/date the project is no longer deliverable due to other external dependencies and details of these. |
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| **Policy and strategy context (national, sub-regional and local)**Brief summary/bullet points only – more details can be provided in the ‘Rational & Background’ section below. Max 200 words. |
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| **Alignment to Dorset LEP priorities under this specific funding call**Brief summary/bullet points only – more details can be provided in the ‘Rational & Background’ section below. Max 200 words. |
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| **Delivery track record & project management**Provide a summary of previous project delivery and track record. Is there/will there be a dedicated experienced Project Manager assigned to deliver this project? |
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| **Section A – Strategic Case** |

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| **Executive summary** |
| Max 350 words. |

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| **Project objectives** |
| Please provide key specific objectives/milestones planned to be achieved by this project – these should be SMART (Specific, Measurable, Achievable, Realistic, Time-bound). Max 250 words. |

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| **Rationale and background** |
| Narrative to include reasons why project is being undertaken, evidence of why the project is needed (including stakeholder engagement) and how will the project delivers the brief taking into account the local policy and strategy context (national, sub-regional and local), as well as alignment to strategic priorities for Dorset as identified under this specific call. Max 250 words - include maps/ graphs as appendices. |

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| **Section B – Economic Case** |

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| **Business Options** Analysis and reasoned recommendation against a range of options. The preferred option must be highlighted, including decisions why that is the preferred option and why others were not taken forward. |
| **Do nothing (Option 1)** |
| Max 250 words. |
| **Do the minimum (Option 2)** |
| Max 250 words. |
| **Do something (Option 3)** |
| Max 250 words. |
| **Do something (Option 4)** |
| Up to 250 words |

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| **Key milestones**List the key milestones proposed for the delivery of your project and their delivery date. Add additional rows if necessary. |
| **Milestone activity** | **Completion date** |
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**Outputs & Outcomes Summary**

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| **Indicator**Please add/delete rows as appropriate. Detail any other quantifiable outcomes not captured below. | **Unit** | **Total**  | **Financial Year** |
| **21/22** | **22/23** | **23/24** | **24/25** | **25/26+** |
| **New jobs created**The total number of newly created, permanent full-time equivalent jobs as a direct result of the intervention. Created jobs exclude those created solely to deliver the intervention (e.g. construction). A job is deemed as permanent if it lasts at least a year. | **FTEs** |  |  |  |  |  |  |
| **Jobs safeguarded**The total number of permanent full-time equivalent safeguarded jobs as a direct result of the intervention. Safeguarded jobs exclude those created solely to deliver the intervention (e.g. construction). A job is deemed as permanent if it lasts at least a year. | **FTEs** |  |  |  |  |  |  |
| **New construction jobs created**The total number of new construction jobs to deliver the intervention. | **FTEs** |  |  |  |  |  |  |
| **New apprenticeships**Number of apprenticeship positions created as a direct result of the intervention. | **No. FTEs** |  |  |  |  |  |  |
| **New learners assisted/ supported**The number of new learners assisted as a direct result of the intervention, in courses leading to a full qualification. | **No. FTEs** |  |  |  |  |  |  |
| **Housing units unlocked** The number of housing units that would be unlocked by the intervention. | **No.** |  |  |  |  |  |  |
| **Housing units delivered**The number of completed housing units. Complete refers to physical completion of the individual unit, or, in the case of flats, on physical completion of the block. Housing unit refers to one discrete housing unit (e.g. house, flat, live/work), regardless of size. | **No.**  |  |  |  |  |  |  |
| **New commercial/ learning/R&D\*** **floorspace developed**The amount of "new build" floor space constructed. \*(delete as appropriate) | **Sqm** |  |  |  |  |  |  |
| **Commercial/learning/R&D\* floorspace developed**The amount of floor space refurbished to improve building condition and/or fitness for purpose.\*(delete as appropriate) | **Sqm** |  |  |  |  |  |  |
| **Indicator**Please add/delete rows as appropriate. Detail any other quantifiable outcomes not captured below. | **Unit** | **Total**  | **Financial Year** |
| **21/22** | **22/23** | **23/24** | **24/25** | **25/26 +** |
| **Number of new super/ultrafast broadband connections** Number of additional commercial premises and domestic dwellings that, as a result of intervention, now have the option to access broadband of at least 30mbps (average), where this was not previously the case. | **No.** |  |  |  |  |  |  |
| **Specialist Capital Equipment – provide a list** Specialist equipment is considered as resources specific to a particular sector or industry, and which are required in connection with that sector or industry’s production of goods and services. These resources will usually comprise specific mechanical devices, but may include bespoke software, or a combination. Includes resources used to produce goods and services, as well as training resources unique to the industry (e.g. simulators). Does NOT include general equipment, IT infrastructure or resources used for several curriculum areas. |  |  |  |  |  |  |  |
| **Other Capital Equipment** **– provide a list** Non-specialist capital equipment (see above). |  |  |  |  |  |  |  |
| **Number of businesses/ enterprises/institutions\*****receiving support.**The number of organisations assisted by this intervention. \*delete as appropriate | **No.** |  |  |  |  |  |  |
| **New businesses/****enterprises/institutions\*****created.**The number of organisations created by this intervention.\*delete as appropriate | **No.** |  |  |  |  |  |  |
| **Increase in turnover** | **£** |  |  |  |  |  |  |
| **Number of new retrofits delivered** Number of domestic and non-domestic retrofits completed as a direct result of the intervention. | **No.** |  |  |  |  |  |  |
| **Indicator**Please add/delete rows as appropriate. Detail any other quantifiable outcomes not captured below. | **Unit** | **Total**  | **Financial Year** |
| **21/22** | **22/23** | **23/24** | **24/25** | **25/26 +** |
| **Kg of CO2 emission avoided**Kg of CO2 emissions avoided as a direct result of the intervention. | **Kg** |  |  |  |  |  |  |
| **Sqm of new public realm/green space**The area (sqm) of public realm or green space improved or created by this intervention. | **Sqm** |  |  |  |  |  |  |
| **Private/public/third\*** **sector investment leverage**\*delete as appropriate | **£** |  |  |  |  |  |  |
| **Other e.g. health outcomes/estate improvements**Please add details of any additional outcomes expected to be delivered as part of the project and which you feel demonstrate the impact of the project. Add rows as necessary to categorise the additional outcomes. |  |  |  |  |  |  |  |

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| **Additional & wider non-monetised and non-quantifiable benefits**  |
| Max 250 words. |

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| **Wider impacts**  |
| Describe, and where possible, measure the economic benefits from the project such as productivity increases and import substitution, to:* external parties, including customers
* others in the supply chain
* wider industry
* the UK economy

Describe, and where possible, measure:* any expected impact on government priorities
* any expected regional impacts of the project

Describe any expected social impacts, either positive or negative on, for example:* quality of life
* social inclusion, exclusion and diversity
* education
* public empowerment
* health and safety regulations

Max 300 words. |

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| **Environmental Impact** |
| Any expected environmental impacts, either positive or negative.Please identify how the project will be managed to ensure, as far as reasonably possible, the development is sustainable and there is minimal damaging environmental impact.Max 200 words. |

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| **Expected dis-benefits**  |
| Potential outcomes perceived as negative by one or more stakeholders, which would arise as actual consequences (not risks) of carrying out project.Max 250 words. |

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| **Section C – Financial Case** |
| Narrative surrounding the estimated detailed costs and how they were derived, detail on how risks have been costed and where any local contributions come from.Max 350 words. |

**Indicative Funding Profile**

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| --- | --- | --- | --- | --- | --- |
| **Quarter/Financial Year** | **Required Capital Funding** | **Capital** **Match Funding** | **Revenue** **Match Funding**  | **In-kind** **Match Funding**  | **Total Funding**  |
| Q1 FY 22/23 | £ | £ | £ | £ | £ |
| Q2 FY 22/23 | £ | £ | £ | £ | £ |
| Q3 FY 22/23 | £ | £ | £ | £ | £ |
| Q4 FY 22/23 | £ | £ | £ | £ | £ |
| **TOTAL FY 2022/23** | **£** | **£** | **£** | **£** | **£** |
| Q1 FY 23/24 | £ | £ | £ | £ | £ |
| Q2 FY 23/24 | £ | £ | £ | £ | £ |
| Q3 FY 23/24 | £ | £ | £ | £ | £ |
| Q4 FY 23/24 | £ | £ | £ | £ | £ |
| **TOTAL FY 2023/24** | £ | £ | £ | £ | £ |
| Q1 FY 24/25 | £ | £ | £ | £ | £ |
| Q2 FY 24/25 | £ | £ | £ | £ | £ |
| Q3 FY 24/25 | £ | £ | £ | £ | £ |
| Q4 FY 24/25 | £ | £ | £ | £ | £ |
| **TOTAL FY 24/25** | £ | £ | £ | £ | £ |
| **Total Funding** | **£** | **£** | **£** | **£** | **£** |

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| **Investment Appraisal**  |
| Compare aggregated benefits and dis-benefits to project costs using Return On Investment (ROI) measure.Max 200 words. |

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| **Section D – Commercial Case** |
| Narrative surrounding the market review, procurement and delivery options, contractual milestones, commercial dependencies. Please consider if Subsidy Control would affect this project.Max 200 words. |

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| **Section E – Management Case** |
| Narrative surrounding project governance and management of the project, delivery programme, key milestones. stakeholder engagement, benefits realisation and risk management.Link to other existing Dorset LEP projects and wider projects. Evidence your delivery track record. Who will deliver this project is there a team/project manager in place? Max 350 words. |

**- End of form -**

Please submit your completed outline business case related to **Healthy Ageing and Low Carbon Energy Infrastructure** via email toDorsetLEPProgrammeManagementTeam@bournemouth.ac.uk **by 09:00, 5 October 2021**.