



## Capital Management Plan Project Business Case Template

**Asset Management Services**  
Within the Division of Finance & Administration

Private Bag 35  
HOBART 7001  
Ext. 2792

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A business case is required to support a request for Capital Management Plan funding which could be required to modify existing space, to provide additional space for activities or to improve existing infrastructure, especially for research activities. Relevant supporting documentation may be attached if necessary.

When completed and signed by the Head of Faculty or Division the business case should be forwarded to the Manager, Capital Planning and Management, Asset Management Services in Hobart. To assist with subsequent review both a hard copy signed version and an electronic version of the document will be required. Assistance with completion of the document may be obtained by contacting the Manager, Capital Planning and Management within AMS.

The time taken to deliver a capital works project will be dependent on a number of factors including:

- When the request is received in relation to scheduled meetings of the Capital Management Plan Review Committee (CMPRC). Unfortunately, it could take up to three months if the request is received at the wrong time in the meeting cycle.
  - The size and complexity of the project, which will affect design and local authority approval times.
  - The time of year. If a project is required for Semester 1 it would need to be fully designed and out to tender by the preceding September for work to commence at the end of Semester 2.
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## **SECTION ONE – APPLICANT DETAILS**

<Faculty/Division/School/Section>

<Contact person>

<Telephone extension number>

<Email address>

## **SECTION TWO – PROJECT DETAILS**

### **1. Details of the project for which funding is required.**

**NOTE:** Information in this section should include the following and other relevant information:

- 1.1 Details of the project for which funding is required. **Include details of space requirements such as space to be refurbished or new space to be provided:**

<text>

- 1.2 Details of activities/functions proposed to be accommodated:

<text>

- 1.3 Details of any specialised plant or equipment to be accommodated. **Include details of any specific requirements, for example a need for temperature controlled space, additional ventilation, no vibrations:**

<text>

- 1.4 Requested timeline for project completion:

<text>

### **2. Demonstrate project need**

**NOTE:** Information in this section could include the following points and any other relevant information:

- 2.1 Explain need and justification for this project within the context of the EDGE2 priorities and the faculty/division strategic plan.

<text>

- 2.2 Explain the need for the project, **in terms of:**

- **problems to be resolved, indicate if they are compliance problems, for example OH&S problems or strategic problems;**
- **Opportunities to be pursued;**

- Business development; and/or
- Business maintenance.

<text>

2.3 Provide an assessment of the impact of the project proceeding in terms of high, low or medium impact on faculty activities.

<text>

2.4 Provide details of the investigations or consultations undertaken to establish the project need. This could include:

- The result of any demand analysis or SWOT analysis undertaken;
- A market overview;
- Competitor information; and/or
- Consultations within a section, school, faculty or division; consultation with University Council, Senate or Planning and Resources Committee; consultation with external stakeholders.

<text>

2.5 Where relevant, provide details of increases in staff FTE and student EFTSU that have occurred or are anticipated as a result of the project.

<text>

2.6 Provide details of alternative operational options considered.

It is sometimes possible to introduce a new initiative in a way that does not require the University to expend capital funds. The application should detail the alternatives investigated and explain why they are not considered to be suitable/satisfactory. Alternatives could include the following:

- Altering the way a subject is taught, by extending teaching into non-standard timeslots (weekends, evenings, summer or winter schools etc) or by using web-based techniques;
- Sharing existing University facilities;
- Re-allocating space currently occupied by other faculty/division activities;

<text>

### 3. Justification for the identified project timeline.

A supporting case is required if there is a specific reason for completing a project by a specified date.

<text>

### 4. Risk Management/Hurt Statement

This section attempts to identify risks associated with undertaking project and/or difficulties that could arise if it is not undertaken.

4.1 Outline of any known risks that could arise in undertaking the project.

Points to consider include:

- School business objectives;
- The asset and resource base, including personnel, space, need to obtain special permits eg Radiation, OH&S or disability access;
- Revenues and costs;
- The community;
- Performance, including timing; and
- The environment.

<text>

4.2 Provide an assessment of the impact of the project not proceeding or not being completed on time.

<text>

## SECTION THREE – FINANCIAL INFORMATION

### 5. Anticipated Cost

Information should only be provided in this section if the applicant has a **real** idea of the possible cost. For example, if the applicant has paid for a suitable consultant to undertake a feasibility study or provide a cost estimate. As well as the anticipated cost, the date of the estimate and the qualifications of the person providing the estimate should be provided. Where a written estimate exists, a copy should be attached to this business case.

<text>

**6. Funding Expectations**

Identify the amount and source of any funding that is available for the project. This could include contributions from within the University or external funding sources.

<text>

**7. Income Implications**

If the funding is requested to enable the School or Faculty to obtain research funding, retain existing research funding or generate income from any other external sources details of the anticipated increase or potential decrease in income over a five year period are required.

<text>

**SECTION FIVE – AUTHORISATION**

The request is to be signed by the Head of the submitting Budget Centre and then authorised and prioritised by the Head of Faculty or Division. In providing a priority, the Head of Faculty or Division will need to take account of any other requests for capital funding being submitted by the Faculty/Division.

**Priority of this project compared to others already submitted <text>**

**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_

## **SECTION SIX – INTERNAL AMS ACTIVITIES**

**NOTE:** This section to be completed by AMS / Finance. However, when completing the application, please note that the following points need to be considered prior providing a report to the CMPRC.

### **8. Background Asset Status Investigations**

- 8.1 Assessment of existing accommodation.
- 8.2 University space statistics relating to occupancy and utilisation.
- 8.3 Consideration of duplication of existing University resources.
- 8.4 Potential for sharing existing assets or new assets to be acquired.

### **9 Impact on annual operating budget**

- 9.1 Consider the impact of increasing space, or altering the function of existing space, on the budget for cleaning, maintenance, security etc and on the annual power and water costs.
- 9.2 Where infrastructure is to be altered, consider the cost impact on power and other services.

### **10 Impact on existing buildings or infrastructure.**

- 10.1 Review existing building or services infrastructure to confirm that it will support the proposed alterations. If not estimate cost to upgrade.
- 10.2 Identify any building compliance issues that will need to be addressed as part of the project.
- 10.3 Identify any existing OH&S issues that will need to be addressed as part of the project.

### **11 Impact of project on other campus activities**

- 11.1 Parking
- 11.2 Landscape
- 11.3 In-ground services
- 11.4 Potential to disrupt other activities in the vicinity

**12 Identification of any possible risks associated with the project and possible mitigation strategies.**

12.1 Physical risks, for example relating to known soil conditions,

12.2 Business risks, relating to the business of the University

12.3 Resource risks, either within the University or the local industry.

**13 Impact on the community**

13.1 Impact could be increased noise, production of smells, increased or altered traffic flows, or visual impact.