

Business Case Template

Pride in Place programme

(Plan for Neighborhoods)

Organisation name:

Project name:

| | |
|---------|--|
| Version | |
| Date | |

| | |
|-----------------|--|
| Project Sponsor | |
| Phone (mobile) | |
| Phone (work) | |
| E-mail | |

| | |
|-----------------|--|
| Project Manager | |
| Phone (mobile) | |
| Phone (work) | |
| E-mail | |

Contents

| | | |
|------|---|-------------------------------------|
| 1. | Introduction | 3 |
| 1.1. | Overview | 3 |
| 1.2. | Objectives | 3 |
| 2. | Strategic Case..... | 3 |
| 2.1. | Addressing Gaps in Existing Arrangements | 3 |
| 2.2. | Alignment with Pride in Place and Organisational Strategies | 3 |
| 3. | Economic Case | 4 |
| 3.1. | Options Considered | 4 |
| 3.2. | Preferred Option | 4 |
| 4. | Commercial Case | 4 |
| 4.1. | Procurement Approach and Contractual Arrangements..... | 4 |
| 4.2. | Delivering Value for Money | 4 |
| 4.3. | Generating Social Value for the Community | 5 |
| 5. | Financial Case | 5 |
| 5.1. | Funding and Constraints | 5 |
| 5.2. | Budget and Cost Structure..... | 5 |
| 5.3. | Funding | 6 |
| 5.4. | Tax considerations..... | 6 |
| 5.5. | Capital Costs (Non-Recurrent) | 6 |
| 5.6. | Ongoing costs (Recurring commitment)..... | 6 |
| 5.7. | Financial summary..... | Error! Bookmark not defined. |
| 6. | Management Case | 7 |
| 6.1. | Governance, Roles and Reporting Arrangements | 7 |
| 6.2. | Risk and Communication Management..... | 7 |
| 6.3. | Key Stakeholders..... | 7 |
| 6.4. | Key Milestones..... | 7 |
| 6.5. | Risk Management and Mitigation..... | 8 |
| 6.6. | Risk Identification, Assessment and Mitigation..... | 8 |
| 6.7. | Ongoing Risk Monitoring and Governance..... | 8 |
| 6.8. | Equality, Diversity and Inclusion | 8 |
| 6.9. | Environmental Impact and Sustainability | 9 |

1. Introduction

1.1. Overview

Please provide a brief overview of your project, summarising its purpose and main objectives.

<INSERT>

Example: Our project aims to revitalise the local park by installing accessible play equipment, improving lighting, and adding seating areas. The purpose is to create a safe, inclusive space for families and residents, encourage outdoor activities, and strengthen community pride.

1.2. Objectives

Please clearly state the main objectives and expected benefits of your project in a SMART format (Specific, Measurable, Achievable, Relevant, Time-bound). Refer to the examples.

| Objectives | Description | Measure |
|----------------------------|---|--|
| Improve public spaces | Upgrade 3 key community areas with inclusive design | Completion of upgrades by Dec 2025 |
| Enhance accessibility | Install step-free access in all project locations | 100% compliance with accessibility standards |
| Boost community engagement | Deliver 5 local consultation events | Minimum 200 residents engaged |
| Support local economy | Use local suppliers for 50% of procurement spend | Procurement reports confirm target |

2. Strategic Case

2.1. Addressing Gaps in Existing Arrangements

Why is this project necessary, and what strategic objectives or service gaps does it aim to address?

<INSERT>

Example: The project addresses gaps in the current service model, which cannot meet growing community needs or efficiency targets. Existing processes are fragmented and rely on outdated systems, causing delays and higher costs. This project will improve accessibility, streamline workflows, and ensure compliance. Key objectives include enhancing customer experience, reducing turnaround times, and aligning resources with future demand.

2.2. Alignment with Pride in Place and Organisational Strategies

How does your project support the Pride in Place programme (thriving places, stronger communities, taking back control) and/or align with other strategies for Torquay?

<INSERT>

Example: This project strengthens the Pride in Place programme by improving local infrastructure and access to quality services, helping create vibrant and resilient communities. It supports objectives such as economic growth, better public spaces, and sustainable solutions. The project also aligns with wider council strategies on regeneration and digital transformation, ensuring a joined-up approach to long-term development.

3. Economic Case

3.1. Options Considered

What delivery options were considered, and how do they compare in terms of benefits, risks, and alignment with objectives?

| Option | Description |
|-------------------------------------|--|
| Option 1 Business as Usual (BAU) | <i>Continue current arrangements. Does not address service gaps or meet Pride in Place objectives.</i> |
| Option 2 Do Minimum | <i>Make essential compliance upgrades. Offers limited improvement and lacks transformational impact.</i> |
| Option 3 Preferred Option | <i>Deliver a full regeneration package aligned with Pride in Place priorities. Requires higher investment but maximizes benefits, improves infrastructure, and supports vibrant communities.</i> |

3.2. Preferred Option

Why is the preferred option the best choice, and what will the final deliverables and scope include?

<INSERT>

Example: The preferred option is most suitable as it fully supports the Pride in Place vision of creating inclusive and sustainable communities. Deliverables include improved public spaces, better transport links, and enhanced community hubs. The scope covers infrastructure upgrades, landscaping, and stakeholder engagement, with clear boundaries to prevent scope creep. This ensures measurable outcomes aligned with long-term objectives.

4. Commercial Case

4.1. Procurement Approach and Contractual Arrangements

What procurement approach and contractual arrangements will ensure effective and compliant delivery of Pride in Place objectives?

Refer to: <https://www.torbay.gov.uk/business/procurement/invite/>

<INSERT>

Example: An open tender process was used to ensure transparency and compliance with public sector regulations. This approach attracts suppliers experienced in regeneration and community-focused projects. The contract includes clear terms for quality standards, data protection, and performance monitoring, with escalation procedures and service credits to maintain delivery standards. All provisions align with Pride in Place objectives, such as improving public spaces and fostering community engagement.

4.2. Delivering Value for Money

How will you ensure value for money and alignment with Pride in Place priorities?

<INSERT>

Example: The supplier was selected for their proven experience in regeneration and ability to deliver innovative, cost-effective solutions. Their proposal aligns with Pride in Place priorities, including improved infrastructure and inclusive spaces. Contract management will be led by an experienced project team, supported by strong governance and regular performance reviews to ensure value for money and timely delivery.

4.3. Generating Social Value for the Community

How will procurement and delivery of this Pride in Place project create social value for the local community in Torquay?

Refer to: <https://www.torbay.gov.uk/council/social-value/torbay-council-s-social-value-procurement-policy/>

Contact person: Lucy Lewis lucy.lewis@torbay.gov.uk Build Torbay Project Coordinator - Torbay Council

<INSERT>

Example: The procurement approach prioritises suppliers who demonstrate strong social value commitments, in line with Torbay Council's Social Value Policy. The chosen contractor will provide benefits such as employing local labour, offering apprenticeships, and sourcing materials from local businesses to boost the economy. Community engagement activities, including volunteering and skills workshops, will be built into the contract to promote inclusion and resilience. These measures ensure the project delivers lasting social and economic benefits for Torbay residents.

5. Financial Case

5.1. Funding and Constraints

What is the financial approach for delivering this Pride in Place project, including funding sources, constraints, and opportunities?

<INSERT>

Example: The financial approach combines Pride in Place grant funding with approved Council capital allocations. The budget complies with grant conditions, including strict timelines and reporting requirements. Key constraints include completing delivery within the financial year to avoid clawback, while opportunities exist to secure match funding from local partners. Costs have been benchmarked against similar projects to ensure accuracy and value for money.

5.2. Budget and Cost Structure

How will the approved budget and cost structure ensure financial viability and deliver value for money in line with Pride in Place objectives?

<INSERT>

Example: The approved budget includes all capital and ongoing costs, with contingency and risk allowances to ensure viability. Spending focuses on key workstreams such as public realm improvements and community facilities that directly support Pride in Place objectives. Regular financial monitoring and governance will track costs against milestones, ensuring transparency and that every pound delivers measurable social and economic benefits.

5.3. Funding

Provide details of the Pride in Place funding requested for this project, including the total amount, expenditure to date, and remaining balance. This information can be drawn directly from your project finance records. Include a brief narrative below to explain any key considerations, constraints, or updates related to this funding.

| Funding Budget Holder | Funding Stream | Amount | Expenditure to date | Remaining balance | Contingency (~10%) |
|-----------------------|----------------|----------|---------------------|-------------------|--------------------|
| Name | Pride in Place | £ | £ | £ | £ |
| Name | | £ | £ | £ | £ |
| Name | | £ | £ | £ | £ |
| Totals | | £ | £ | £ | £ |

5.4. Tax considerations

Identify any tax implications or arrangements associated with the Pride in Place-funded project. Confirm whether VAT or other tax liabilities apply to the grant-funded expenditure and outline how these will be managed. If you are unsure, please contact the Finance Team for guidance.

Contact person: Sarah Davis sarah.davis@torbay.gov.uk Senior Finance Officer - Technical & Budgeting – Torbay Council

5.5. Capital Costs (Non-Recurrent)

Provide a breakdown of the capital costs for the project funded through the Pride in Place grant. Include the main contract price. Ensure contingency and risk budgets are included to cover unforeseen issues. Refer to examples below.

| Description | Value | Comments |
|----------------------------------|------------------|---|
| <i>Main Contract Price</i> | £ 450,000 | <i>Includes construction and installation works</i> |
| <i>Design & Consultancy</i> | £ 50,000 | <i>Architectural and engineering services</i> |
| <i>Contingency Allowance</i> | £ 30,000 | <i>Covers unforeseen issues</i> |
| <i>Risk Budget</i> | £ 20,000 | <i>For potential delays or cost variations</i> |
| <i>Equipment & Materials</i> | £ 25,000 | <i>Fixtures, fittings, and landscaping</i> |
| Total | £ 575,000 | |

5.6. Ongoing costs (Recurring commitment)

Outline any ongoing costs or revenue implications associated with the Pride in Place-funded project. Specify how these costs will be funded, identify the relevant budget holder, and confirm approval for the period. If income will be generated, detail the expected amount and calculate the net balance. Indicate whether these costs apply annually or for a fixed contract duration. Refer to examples below.

| Description | Value | Comments |
|-----------------------|-----------------|--|
| <i>Maintenance</i> | £ 15,000 | <i>Annual upkeep of public spaces and facilities</i> |
| <i>Resource Costs</i> | £ 10,000 | <i>Staff time for monitoring and community support</i> |
| <i>Income</i> | £ 5,000 | <i>Expected revenue from venue hire and events</i> |
| Total | £ 20,000 | <i>Net cost after income</i> |

6. Management Case

6.1. Governance, Roles and Reporting Arrangements

What is the governance structure of your organisation?

<INSERT>

Example: The project will follow a defined governance framework aligned with Pride in Place objectives. A Project Sponsor will provide strategic oversight, supported by a Project Board for decision-making and progress reviews. Day-to-day delivery will be managed by a Project Manager within agreed financial and operational limits. Key stakeholders from finance, procurement, and communications will ensure coordination across workstreams. Progress will be tracked through regular governance meetings, dashboards, and risk registers, with formal reporting monthly to the Project Board.

6.2. Risk and Communication Management

How will risks and communications be managed to ensure successful delivery and alignment with Pride in Place objectives?

<INSERT>

Example: Risks will be tracked through a risk register and mitigation plan, reviewed at each governance meeting. Benefits will be monitored against agreed KPIs, such as improved public spaces and increased community engagement. A communications plan will include stakeholder briefings, public consultations, and updates via council channels to maintain transparency and involvement. This approach ensures risks are controlled, benefits delivered, and stakeholders kept informed throughout the project.

6.3. Key Stakeholders

Outline the key stakeholders in the table below.

| Name | Title | Project Role / Area of Expertise |
|------|-------|----------------------------------|
| | | Senior Responsible Officer |
| | | Project Management |
| | | Operational |
| | | Financial oversight and scrutiny |
| | | Procurement |
| | | Communications (as required) |
| | | Contract manager (as required) |

6.4. Key Milestones

Provide the key milestones for the project in the section below. Refer to examples below.

| Activity | Start | End | Comments |
|-----------------------------|----------|----------|---|
| Project initiation | Jan 2025 | Feb 2025 | Governance set-up and approvals |
| Design and planning | Feb 2025 | Apr 2025 | Finalise designs and stakeholder input |
| Procurement process | Apr 2025 | Jun 2025 | Tender issued and supplier appointed |
| Construction phase | Jul 2025 | Nov 2025 | Delivery of infrastructure improvements |
| Community engagement events | Aug 2025 | Dec 2025 | Ongoing consultation and feedback |
| Project completion | Dec 2025 | Dec 2025 | Handover and final reporting |

6.5. Risk Management and Mitigation

What are the key risks that could affect successful delivery of the Pride in Place project, and how will they be mitigated?

<INSERT>

Example: Risks will be managed through a live risk register and mitigation plan, reviewed at monthly Project Board meetings. High-impact risks will be escalated to the Pride in Place Steering Group for timely action. Mitigation measures will be tracked alongside project milestones to ensure alignment with objectives and prevent delays. This proactive approach ensures risks are controlled and benefits delivered as planned.

6.6. Risk Identification, Assessment and Mitigation

Please complete the Risk Management Table:

- Risk – State the specific risk (e.g., funding delay, contractor performance).
- Risk Level – Assess impact and likelihood (High, Medium, Low).
- Description – Briefly explain what could happen and why it matters.
- Mitigation – Outline actions to reduce or manage the risk (e.g., contingency plan, regular monitoring).

RAG: use Red – Amber - Green to show severity:

- Red (High): Major impact; needs urgent action and senior oversight.
- Amber (Medium): Moderate impact; mitigation in progress; monitor closely.
- Green (Low): Minor impact; controls in place; review periodically.

| Risk | Risk Level | Description | Mitigation | R-A-G |
|-----------------------------|------------|--|---|-------|
| Funding delays | High | Delay in receiving grant funds could impact timeline | Regular liaison with funding body; contingency plan | R |
| Contractor performance | Medium | Poor delivery quality or missed deadlines | Robust contract terms; performance monitoring | A |
| Community engagement issues | Low | Limited participation from local residents | Early engagement; clear communication strategy | G |

6.7. Ongoing Risk Monitoring and Governance

How will ongoing risk monitoring and governance keep the project aligned with Pride in Place objectives?

<INSERT>

Example: Risk monitoring will be part of the governance process, with a live risk register reviewed at quarterly Board meetings. Mitigation plans will be tracked against key milestones to ensure objectives like improved public spaces and community pride are met. This approach ensures risks are managed proactively and do not affect delivery.

6.8. Equality, Diversity and Inclusion

How does your Pride in Place project promote equality, inclusivity and support community cohesion?

<INSERT>

Example: An Equality Impact Assessment was completed to ensure no group is disadvantaged. The project includes accessibility improvements like step-free access and inclusive design standards. Engagement activities involve diverse community voices, so decisions reflect everyone's needs. This approach supports equality and complies with the Equality Act 2010. Within your answer please be clear about how your project will bring different communities together and how it will avoid and tackle discrimination. You also need to identify what steps will you be taking to make sure that your project is fully accessible.

6.9. Environmental Impact and Sustainability

How does your Pride in Place project minimise environmental impact and support sustainability?

<INSERT>

Example: An Environmental Impact Assessment was carried out to ensure the project reduces harm and promotes sustainability. Measures include using low-carbon materials, improving energy efficiency, and enhancing green spaces. Waste reduction and recycling plans are in place, and suppliers are encouraged to follow sustainable practices. This approach supports environmental goals and aligns with the Pride in Place commitment to creating greener communities.