



Request for Project Approval

for ***[insert proposed project name]***

Prepared by:
Proposed Project Sponsor:

[insert date]

RESTRICTED

EXECUTIVE SUMMARY

This is possibly the most important part of your business case. It should contain a clear and concise outline of the whole proposal, including the rationale for proceeding with it.

An executive summary should be **very short** (one page) and include:

- a short account of the current position, issues / problems and the need for change;
- the broad scope of the proposal;
- a brief outline of the method of analysis used to identify and assess options for addressing the issues / problems;
- a short description of the recommended approach or solution, including expected benefits and any known drawbacks.
- a cost summary.

As a guide, each of the above components should be no longer than one paragraph. However, you should make sure you refer to all the key points and features of your proposal and argument to make your readers aware of what is in the fuller document. Most importantly, the Executive Summary must be interesting and persuasive in its own right.

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Instructions / Considerations when writing this report

*The area in blue is a guide to assist you in completing a succinct request for Board approval. You do not have to address every component as a Business Plan – it is to give the Board an overview of your concept and proposal. **Ideally you should be able to address this request proposal in 3 to 4 pages maximum.***

N.B. The dot points in #3 of this instruction are critical to address.

1. Idea generation

There are many areas from which an idea for a new project can originate. Strategic projects will generally come from the strategic plan whilst service ideas generally come from the members. As the majority of projects need to be aligned with the strategic direction of Rotary (International, District or Club), the highest level of project endorsement, within the club, is usually required.

2. Project Sponsor

To obtain approval, the project will require a sponsor or a champion. Ensure a sponsor has been approached and is prepared to champion the cause.

3. Higher level endorsement

The purpose of this report is to detail the proposal for a project so that it can be approved. The project approving authority will consider the proposal against the following:

- What are the benefits of the project?*
- What is the cost of the project to the Rotary Club?*
- When will the project be realised?*
- Is this proposal in line with the Clubs strategic goals, objectives and requirements?*

Adequate analysis of these considerations needs to be included in the proposal.

1 Project Background

Consider:

- the present situation*
 - the need for change*
 - strategic issues*
 - relationship to policy / legislation / corporate direction*
 - impact on stakeholders*
-

2 Project proposal

Detail the summary of what the project proposal is:

- purpose*
- planned outcomes*
- description of the project*
- overall timeframe*

3 Benefits and opportunities of proposal

Detail:

- the anticipated benefits of conducting the project (are these realistic?)*
 - the opportunities that the project will create*
 - the change that will occur as a result of the project*
 - when the benefits/outcomes will be realised*
-

4 Costs and risks of proposal

There are costs involved in conducting any project which will be considered by the Board when giving a judgement on the project. The Board will also consider if the anticipated benefits justify the proposed costs and resources required to finalise and implement the deliverables (ie. will the club achieve value for money, financially, or via our service objectives, from investing in this project?).

Address the following:

- the limitation of this project i.e. what are the elements of this project that will not be delivered that someone may reasonably assume will be part of the final project deliverables*
 - the estimate of resources involved to achieve the deliverables*
 - the estimate of the additional money required*
 - implementing the deliverables may result in the cessation or description of current activities, initiatives or resources. Detail these.*
 - detail any additional future commitments the club may/will be obligated to, as a result of implementing the proposed deliverables. This may include the requirement to conduct further projects or follow up activities that will require additional resources.*
 - detail the risks to the success of the project and what will it take to manage them*
 - detail the risks of not proceeding.*
-

5 Affect/alignment with other Rotary Club initiatives

Consider:

- If previous projects have covered the proposed scope and whether this can be utilised in this project.*
 - Other current or proposed projects that are considering some or all of the elements of this project*
 - If there are similar or overlapping projects, provide recommendations to change or modify projects to avoid redundancies*
 - To create efficiencies, consider if the scope of this proposal should be extended to cover other initiatives*
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6 Timing

Detail the estimate of the time required to complete the project and ensure this is realistic. Include any contingency in the timing to allow for risks to the project. Also consider the affect of delays in the approval processes and the effect on the project.

Also consider the most appropriate time to start the project. It may be relying on the completion of other projects and this needs to be considered by the approval authority.

7 Options

Discuss the various options that may be utilised that still meet the intent of this proposal.

8 Preferred solution

Outline the preferred solution. Specific objectives need to be defined at this stage and these will be used throughout the life of the project. In determining the objectives, consider:

- objectives** *are the realistic project deliverables that are easily defined, can be measured, are agreed and can be completed in the time allocated. Incorrectly defined objectives will be interpreted differently and it will be hard to measure the final success of the project.*
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