

# Investment Proposal Template (insert name)

Commercial in Confidence

Project Sponsor (Name and Role)	Contact Details	Date submitted

Recommendation

Question	Response	References
1. Name of Proposed Project <i>A short and meaningful name for this initiative</i>		
2. Is this project included in NI business plan and/or the NRC long term business plan?	Yes / No Yes/No	If yes, include reference to section here. If no, include justification of why this should be considered noting any impact on the current plans
3. Include a succinct summary of the proposal, including its purpose and benefit to the region		No more than two sentences, covering; Purpose Benefit
4. Is the proposal consistent with the Investment & Growth Reserve Criteria?		What's In: <ul style="list-style-type: none"> <li>▪ Net economic benefit to Northland</li> <li>▪ Jobs</li> <li>▪ Household income</li> <li>▪ GDP</li> <li>▪ Creation of Jobs</li> <li>▪ What sort of jobs</li> <li>▪ How many jobs</li> </ul>

		<ul style="list-style-type: none"> <li>▪ Sustainability</li> <li>▪ Increasing exports</li> <li>▪ Innovation</li> </ul> <p>What's out:</p> <ul style="list-style-type: none"> <li>• Groups seeking grants</li> <li>• Business benefit 100% outside Northland</li> <li>• Projects with significant unmitigated adverse effects</li> </ul>
5. Does the Project Align with Council priorities:		<ul style="list-style-type: none"> <li>• Maintain and improve the quality of Northland's overall environment.</li> <li>• Build a business friendly environment that encourages business and employment opportunities.</li> <li>• Invest in Northland to increase all our communities' economic performance and quality of living and reduce disparities.</li> <li>• Promote regionally significant infrastructure and improvements that enable economic development, enhance the environment, and connect people and Northland to the wider world.</li> <li>• Encourage the sustainable access and use of our environment in ways that will progress our collective quality of living.</li> <li>• Promote the awareness and appreciation of our heritage, landforms, freshwater and marine environment to encourage our collective pride in Northland.</li> </ul>
6. What is the market sector?		
7. What is the total investment expected to be? 7.1. Ratio of public to private sector funding	<ul style="list-style-type: none"> <li>• _____\$</li> <li>• _____% (public/private)</li> </ul>	Include attachments / references from all sources of funding to the project, including in-kind, over the next 5 years

8. Has a detailed business case been developed?	Yes / No	If yes. please attach / reference ensuring it includes items detailed in note 1 below:
9. What are the expected outcomes (Summary) <i>Capture the purpose of the initiative here, including what will be delivered and what benefits and how they will be measured</i>		High Level (infometrics) GDP Jobs Household Income
10. Explain why this project needs public sector intervention		
11. Identify what public sector support is required and for how long?		Exit strategy
12. Will the project or outcome require certification or operating approvals / licenses from external organisations?	Yes / no	If yes, how will they be obtained and maintained
13. When will the project commence		
14. When will the project conclude		
15. Has a timelines project plan been developed?	Yes / No	If yes, attach it
16. Has a risk analysis been undertaken?	Yes / No	If yes, attach it
17. Has an economic impact analysis been undertaken?	Yes / No	If yes, attach it
18. Has any other supporting market research been undertaken?	Yes / No	If yes, attach it
19. Have KPIs for the Project been determined?	Yes / No	Include details
20. Have KPIs for the outcomes been determined?	Yes / No	Include details (baseline measures, best and worst case scenarios)
21. Is there a business entity?	Yes / No	If yes, what is the governance structure
22. Has this project been peer reviewed	Yes/No	By whom?

Note 1 Business case inclusions:

- 1) Executive summary
- 2) Background to the project
  - i) Description of the project
  - ii) Purpose of the project
- 3) The project
  - i) Scope (road map)
  - ii) Financial summary
  - iii) Market information
- 4) Governance
  - i) Structure
  - ii) Risk analysis summary
  - iii) Project outcomes KPI's
- 5) Appendix
  - i) 5 year P&L, Balance Sheet and Cash Flows
  - ii) Revenue stream (customer name, value, volume, pricing) with supporting customer confirmation
  - iii) Detailed margin calculations (supplier pricing, supply contracts etc)
  - iv) Explanation of operating expenses
  - v) Market research
  - vi) Risk analysis
  - vii) Funding streams (confirmed)
  - viii) CV's of key staff
- 6) References