



Australian Government

Comcare

PRESENTING THE BUSINESS CASE FOR INVESTMENT IN HEALTH AND WELLBEING

This document provides brief guidance for people wishing to implement a health and wellbeing program, on how to present a business case to senior management to obtain authorisation and gain support for the program.

Note that many organisations have business case templates for use when proposing any new organisational investment or activity. Refer to your forms and templates database or Human Resources department to locate your organisation's business case template.

EXECUTIVE SUMMARY

The executive summary is a brief overview of your business proposal, preferably 250 to 300 words. It is recommended that this section be completed last, and be excluded where the business case is presented in oral presentation format, for example, a PowerPoint presentation.

NEEDS ANALYSIS

In this section, outline the key data you have attained and reviewed, along with any organisational assessments conducted. Provide an overview of what appear to be the key issues upon exploration of the data. It is important to link the impact of these issues to the organisation's strategic priorities, to ensure that the issues are viewed as relevant to the achievement of the organisation's business goals and objectives.

CONSULTATION

This section should outline the consultation that has occurred with internal and external stakeholders. It is an overview of who you have conferred with, both within and outside of the organisation, with regard to the needs analysis, selection and design of your proposed intervention.

PROPOSED INTERVENTION

Provide details of the intervention that has been selected as most suitable to address the organisation's needs. Explain how and why you selected this particular intervention, and clearly link the anticipated outcomes of the intervention back to the key areas of focus identified in the needs assessment. A clear explanation of how the expected outcomes will contribute to the achievement of the organisation's strategic priorities will help to ensure that the intervention is seen as a necessary activity.

COST BENEFIT ANALYSIS

Provide a clear overview of the anticipated costs of the intervention, including allocation of all resources, along with the anticipated benefits (for example, a comprehensive wellness program may expect to achieve a 30 per cent reduction in absenteeism, in line with programs conducted in various large organisations). Ensure you are clear on how the expected returns outweigh the investment.

RISK ASSESSMENT

Outline the risks that have been assessed in proceeding and/or not proceeding with the intervention (considering the risk *severity* and how *likely* it is to occur). Use your organisation's risk assessment template to present this information.

DUE DILIGENCE (IF RELEVANT)

This section is applicable if you are proposing to use an external provider to assist with the implementation of your intervention. If this is the case, provide an overview of the proposed provider including information such as their licence/ registration, areas of expertise and prior experience. You may also need to address issues such as how intellectual property will be guarded, the procurement principles of your organisation and compliance with relevant legislation.

TIMELINES AND REPORTING

Detail the stages and/or elements of the intervention, noting the projected timelines, that is, when each stage will begin and its anticipated duration.

Example:

Project stage	Month 1	Month 2	Month 3
Stage 1			
Stage 2			
Stage 3			

Include the progress reports to be completed, reporting periods and the recipients of those reports, in line with your organisation's procedures.

Example:

Report	Due	Recipients
Stage 1 Report	15 January 2012	CEO Human Resources Manager Health and Safety Representative

MONITORING AND EVALUATION

Provide details on how the progress of the intervention will be monitored, that is, what indicators you will be monitoring and how often.

Example:

Key indicator	How it will be measured	Frequency
Participation retention and attrition	Documenting number of participants engaged in the program	Monthly

Lastly, describe how the intervention will be evaluated for effectiveness. Similar to monitoring, provide details on key indicators selected and why (that is, explain how the indicators are a measure of the success of the program) along with how and when they will be measured.