

Service Document Standard Form:
**Medium Term Financial Planning
 Bid Template
 2021/22 to 2025/26**



PROJECT:	<i>Insert name of Project</i>
FILE LOCATION:	<i>Insert file path</i>
DATE:	<i>Insert date document completed</i>
AUTHOR:	<i>Name of person completing this document – could be the proposed Project Manager</i>
PROJECT SPONSOR:	<i>Name of proposed person to be project sponsor</i>
VERSION NUMBER:	<i>Version number of document</i>
APPROVALS:	<i>Persons required to approve this document:</i>
	<ul style="list-style-type: none"> <i>Person proposing project</i>
	<ul style="list-style-type: none"> <i>Business Transformation Board</i>
DISTRIBUTION:	<i>List names / roles to whom this document will be distributed (but who is not required to approve)</i>

DOCUMENT CONTROL

Version:	Date:	Notes:
<i>ie Version 1.0</i>	<i>09-Jan-21</i>	<i>Initial version</i>

APPROVAL RECORD

Version:	Date:	Approval:	Notes:
<i>ie Version 1.0</i>	<i>09-Jan-21</i>	<i>26-Jan-21</i>	<i>Recorded in BTB minutes</i>

All wording within this document shown in red italics is provided as guidance and should be removed prior to publication

Please complete all cells where possible.

Only leave cells blank if:

Alternative options 1, 2 or 3 are not required or if not all cost centre boxes are required

Not all boxes for background papers or appendices are required.

Bid Category

Bid Template 2021/22 to 2025/26

Directorate Corporate Core Reference
Service Service Development
Title of Bid
Lead Officer

1. Executive Summary (Max. 100 words)

[1. Executive Summary \(Max. 100 words\)](#)

2. Options Available

Advantages	Disadvantages
Advantages	Disadvantages
Advantages	Disadvantages

3. Options Appraisal					
	In Year Budget Requirement				
[The recommended option will be populated automatically from Section 4]	21/22	22/23	23/24	24/25	25/26
	£000s	£000s	£000s	£000s	£000s
Recommended Option					
Do Nothing					
Alternative Option 1					
Alternative Option 2					
Alternative Option 3					

4. Detailed Financial Implications					
	In Year Budget Requirement				
(of the recommended option)	21/22	22/23	23/24	24/25	25/26
	£000s	£000s	£000s	£000s	£000s
Controllable Expenditure					
Employees					
Premises Related Expenditure					
Transport Related Expenditure					
Supplies & Services					
Third Party Payments/Outsourcing					
Transfer Payments					
Capital Financing Costs					
Sub-total					
Controllable Income					
Government Grants					
Other Grants & Contributions					
Customer & Client Receipts					
Sub-total					
Net impact of proposal					
Cost Centre (s):					
Reference of related capital bid	<<Finance Use Only>>				

5. Impact on Establishment						
	Current FTE	Year on Year Movement in FTE				
		21/22	22/23	23/24	24/25	25/26
Change in Staffing Levels						

6. Strategic Requirements

Outcomes (linked to corporate priorities)

Legal Implications

Equality and Diversity

Privacy

Environmental

Has an IA been completed

Yes/No

7. Project Plan and Stakeholder Engagement

Stakeholder	Task	Timeframe

8. Project Governance

How will the project be managed? By Whom? How will delays be reported?

9. Project Risk

Key risks, mitigating actions and post-mitigation assessment

10. Provenance Section and Background Papers

11. Appendices