McMaster University

Family Medicine

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Intro to Business Case

Watch a recording of the session here

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Michael G. DeGroote SCHOOL OF MEDICINE

Land Acknowledgements

The Department of Family Medicine, McMaster University, recognizes and acknowledges that it is located on the traditional territories of the Haudenosaunee and Anishnaabeg nations. This territory, covered by the Upper Canada Treaties, is within the lands protected by the Dish With One Spoon Wampum agreement and is directly adjacent to the Haldimand Treaty territory.

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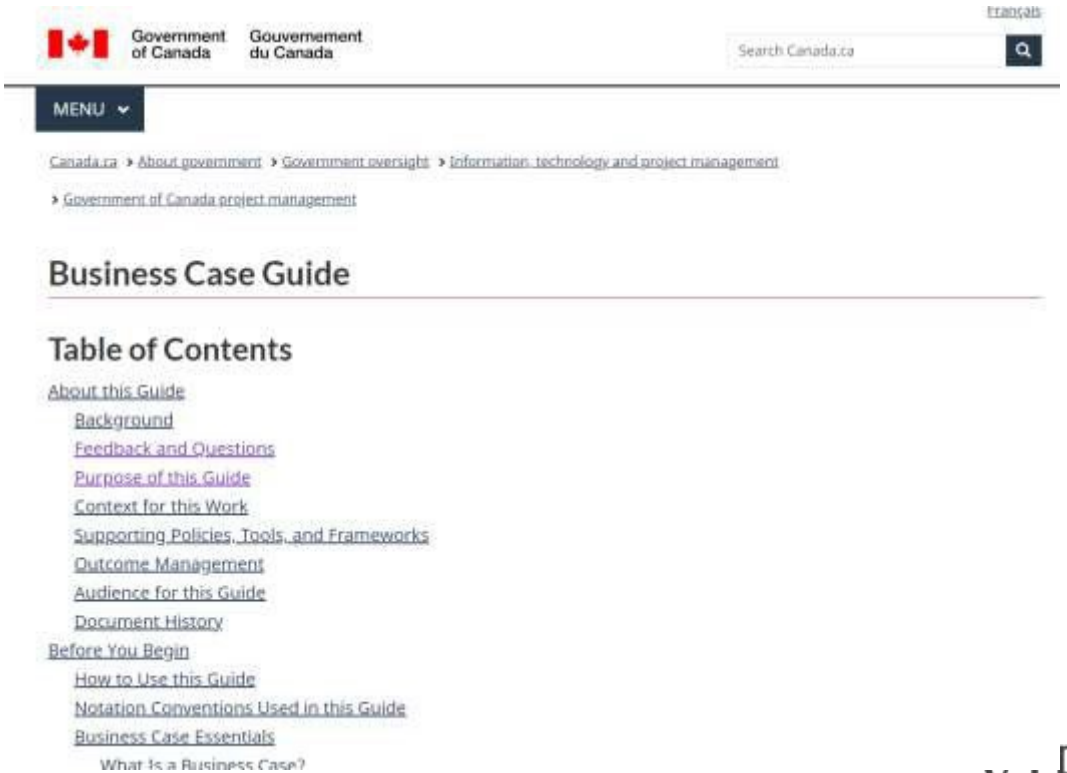
What is a business case?

- Reference: Business Case Guide



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What is a business case?

- A document is typically a presentation or a proposal to an authority by an organization seeking funding, approval, or both, for an activity, initiative, or project
- Provides a basis for funding or supporting an initiative
- Provides basis against continued funding based on evaluation

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What is a business case?

Describes an initiative or a program to policy/decision makers to demonstrate the:

- Need for the program
- Alignment to priorities
- Value for money
- Future return, output, income, acquisition of knowledge or capacity, etc.

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What is a business case?

Describes an initiative or a program to policy/decision makers to demonstrate the:

- Appropriate systems, processes, and controls for managing projects
- Project is undertaken within specific time, cost, and performance parameters
- Level of a project's risk and complexity

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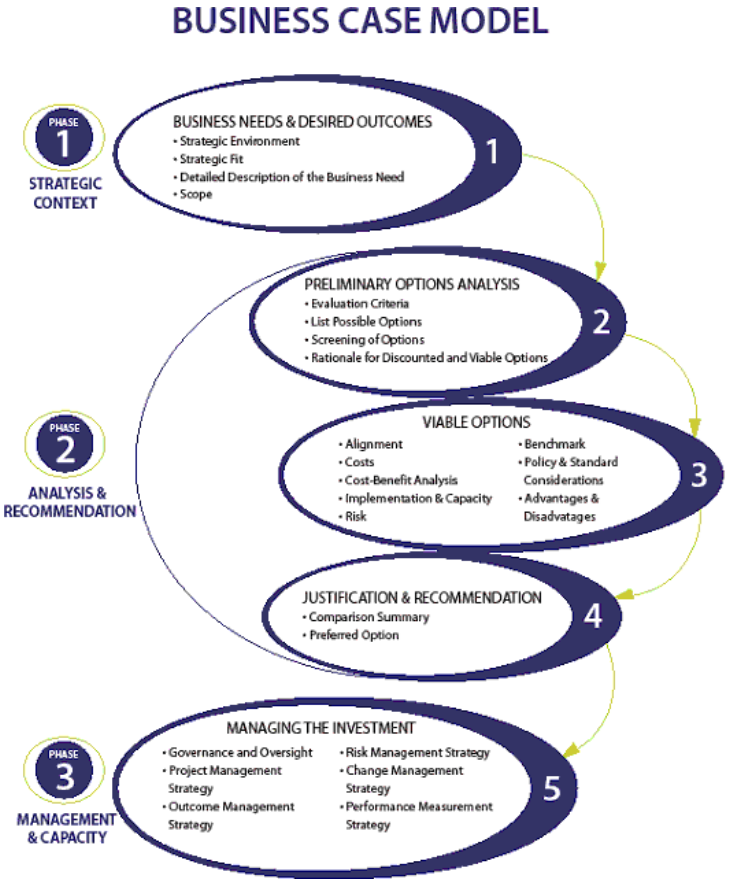
Business Case Model

3 Phases, 3 Steps within each phase:

- **Phase 1**: Strategic Context
  - **Step 1**: Business Needs and Desired Outcomes
- **Phase 2**: Analysis and Recommendation
  - **Step 2**: Preliminary Options Analysis
  - **Step 3**: Viable Options
  - **Step 4**: Justification and Recommendation
- **Phase 3**: Management and Capacity
  - **Step 5**: Managing the Investment



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Next in the presentation

- Did an open-ended survey with our paramedic partners about their experience with preparing business cases
- Our experiences with working with our partners regarding business cases

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Who prepares a business case

- Deputy chief, supported by the chief
- Commanders - for small business cases
- CP supervisors, supported by the chief/deputy chief
- Director of Operational Planning

- Senior Responsible Officer (SRO) - from GC Guide

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What are the situations when you needed to write a business case? Can you give examples (topics, titles, purpose)?

- New initiatives that will affect municipal spending like large capital assets - e.g. vehicles
- For newly created positions (new roles, whether temporary or permanent roles) or additional FTE
- Digital assets, or “pretty much for anything”

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What are the information (data, statistics, return of investment, testimony, etc.) needed to make a successful business case?

- What is the application to the overall strategy of the department, and/or municipality? How does it impact the strategic plan of the County/how does it progress the goals of the county?
- How does it align with local OHT priorities as it applies to Paramedic Services involvement?
- How does it impact the patient?
- How does it impact other healthcare system partners outside of paramedic services?

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What are the information (data, statistics, return of investment, testimony, etc.) needed to make a successful business case?

- How does it create efficiencies in spending/savings for the healthcare system?
- Number of individuals it could impact/serve
- Returns on investment, Rationale/Benefits, Cost-savings
- What will it cost, why is it the best use of funding?
- Is the program sustainable without future investment?

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What are the information (data, statistics, return of investment, testimony, etc.) needed to make a successful business case?

- Background data, historical need, population growth, program growth, demand for this service
- Inclusion of relevant research, best practices, or previously successful deployments are helpful.
- Including metrics from a similar-sized comparator paramedic service can be helpful.
- Patient stories - human side of the project

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What are other elements of a successful business case? (length, structure/format, pictures, graphs, endorsement, etc.)

- “Short, and to the point, as much as you can. 30+ pages won't get read (unless specifically asked for)...”
- Well structured (look at previous business cases), many graphs/charts
- Letters of support
- Follow the template
- Depending on the council

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How did you learn to write a business case?

- Schooling, Business case course, Grad school, Corporate training
- Learning from superiors
- Trial and error, copying templates

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Why is learning about a business case important in research?

- **Translating evidence into practice**
  - For research interventions to be incorporated into the health system, we need to help our partners prove it is worth the investment
- When we do research, we have to remember the basics:
  - Does our intervention answer local/government priorities?
  - Why are we developing a new intervention? Are there other existing options?
  - Incorporate economic analysis component

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Example #1: City of Greater Sudbury Paramedic Services

Why: Permanent funding Greater Sudbury Paramedic Services Health Promotion Community Paramedic Program

Who: City Councillors

What: Council members to “buy” into funding the program

How Long: 15 minutes

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CP@clinic Program Presentation: Sudbury City Council

- Presentation Preparation: Meetings with Communications
  - Insights: Results and No lingo
- Overview of the CP@clinic Program
- Health Profile of Participants
- RCT Details: Intervention, Control, participants
- Local Impact: City of Greater Sudbury Specific Trial Results
  - System Level: Decrease in EMS Calls
  - Individual Level: Health Risk Assessments and Impact (BP, QofL)
- Final Impact of CP@clinic for City of Greater Sudbury:
  - Resource Gains and Cost to Benefit Ratio

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Example #2: B.C. Emergency Health Services (BCEHS)

Why: Funding for CP@clinic Program expansion beyond pilot site

Who: Senior Leadership

- Directors in Strategic Transformation Office
- Senior Executive Directors for Clinical Operations
- Low Acuity Clinical Hub

What: Demonstrating the importance of CP & CP@clinic

How Long: 15 minutes

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CP@clinic Program Presentation: BCEHS Leadership

- Presentation Preparation: Meeting with Director
  - Insights: Characteristics of attendees, Stories and data
- Overview of the CP@clinic Program (Out of Box Program)
  - Video Testimonials (Participants, paramedics)
- Evidence for CP@clinic Program:
  - Publications: CMAJ, Prehospital Emergency Care
  - System Level: EMS calls
  - Individual Level: BP, QofL, Lifestyle Risk
- Potential impact of the CP@clinic Program with BCEHS
  - Cost of 911 Calls
  - Savings

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