

ANDREW MCDOUGALL

Accredited Investment Management Facilitator



*Bachelor of Business Management
(Economics)*

Bachelor of Banking & Finance

*Graduate Diploma of Applied
Finance & Investment*

*Master of Planning & Design
(Research)*

*Graduate of Australian Institute of
Company Directors*

Accredited Gateway Reviewer

*Accredited Investment
Management Facilitator*

Summary

[Andrew McDougall](#) is a Principal & Partner of [SGS Economics & Planning](#); an employee owned public policy advisory firm that has been operating across Australia for 30 years.

SGS' vision is to shape public policy and investment decisions to create sustainable places, communities and economies.

Andrew is SGS' National Leader for Project Appraisal and Evaluation and has been an SGS Executive Directors for a decade. Consequently, Andrew understands well the business case development process across Australia and the fundamental role of Investment Management.

Andrew also:

- Develops strategic and final business cases
- Facilitates Investment Management processes so an investment's logic is concisely stated
- Produces business case inputs including options prioritisation, unmet demand projections, financial appraisals, economic appraisals & socioeconomic impact analyses.

Investment Management

[Investment Management](#) is a process for applying simple, common-sense ideas and practices that help organisations achieve the best outcomes from their investments. It is grounded on three principles:

- Informed discussion with people who have the most knowledge about a subject
- The 'investment story' being depicted on a single page using simple language, and
- Each investment having clear benefits that align with the organisation's outcomes.

Investment Management involves a series of up to four facilitated workshops which step participants through a structured line of enquiry:

- **Problem definition:** What is the problem? Is it real, evidence-based & does it need to be addressed now?
- **Benefits definition:** What benefits will be delivered? Are they of high value to the organisation and the community? Are there meaningful, measurable & attributable KPIs?
- **Response definition:** What is the preferred response? Is it strategic in that it enables numerous project options? Is it feasible & innovative?
- **Solution definition:** What is the preferred solution? Can it be delivered on time & budget? Can it be applied flexibly to manage uncertainty?

Services & fees

The number of facilitated workshops depends on the investment's complexity:

Workshop	Deliverable	Fees (incl. GST)	
		Simple investments	Complex investments
Problem definition	Investment Logic Map	\$2,000	\$2,000
Benefits definition	Benefits Management Map & Plan	n.a.	\$2,000
Response definition	Strategic Response Options Analysis	n.a.	\$3,000
Solution definition	Investment Concept Brief	n.a.	\$2,000
Other services	Tailored deliverables and quotations provided upon request.		