

## **APPENDIX 2 – Business Plan Template and Guidance**

The business plan should be focused and to the point. The following template is a guide, and some sections may not be relevant and/or additional information may be required. Please write your business plan assuming the people evaluating it have no prior knowledge of your organisation.

### **Organisational Details**

Name of Organisation:

Type of Organisation (Town/Parish Council, CIO, CIC, unincorporated group etc):

Company/Charity/Society number (if applicable):

Contact Details:

Brief description of the organisation (how long has it existed, current involvement in the community, legal structure, aims and objectives of the organisation):

How is the organisation governed:

Track record of the organisation in similar projects:

### **Asset Details**

Details of the asset being applied for (Name, Address):

Type of asset (community hall, open space, playground etc):

### **Proposal Details**

Proposed use of the asset (explain what activities/service will be provided from the asset):

Arrangements for managing and operating the asset:

Relevant skills and knowledge available within the organisation to manage/run the asset and/or experience in delivering the type or service/activity proposed:

Details of any partners the organisation will be working with to provide the proposal:

Community requirement/support for this proposal (including any demand from users of the asset, who will benefit from the proposal):

Market research (demand for this proposal within the community, support by the local community, have you gained the views of local people, how will you keep local people informed of the proposal):

Expected outcomes:

SWOT analysis (Strengths, Weaknesses, Opportunities and Threats):

Timescales for asset being operational:

Community benefits (Social, Economic, Environmental and Well- Being) and needs met by the proposed use (ensure cover those benefits specified in EOI (Expression of Interest) and criteria for CAT (Community Asset Transfer)):

How you will manage the repair and maintenance of the asset:

### **Financial Information**

Summary of your organisational accounts (trustee report, annual accounts etc):

Any funding that the organisation will bring to support the transfer (that you have already, funding applications ongoing or proposed funding streams):

Details of any investment or capital expenditure required to enable asset to meet proposal (include how this is funded and what it is for):

Cost plan (financial projections for first 3 years) including how the asset will be financed, operating costs, income etc:

If the proposal includes charging, please provide details of what these charges will be:

### **Risks and Dependencies**

Risk assessment (see template risk assessment below):

Dependencies (what is the proposal dependent on):

### **Legislation, Statutory Requirements and Regulation**

Any Health and Safety implications/controls/mitigations:

How the organisation will effectively manage relevant legislation e.g., safeguarding, disability discrimination, any licencing requirements:

Organisation policies and procedures relevant to the asset transfer:

### **Monitoring & Evaluation**

How will the organisation monitor and evaluate that they are delivering the benefits specified in the proposal:

**Risk Register Template**

Date	Risk	Cause	Effect	Impact	Likelihood	Risk Score	Mitigation	Risk Owner
				H/M/L	H/M/L	H/M/L		

H – High  
M – Medium  
L – Low