

# SUGGESTED TEMPLATE

## 5-Year Business Plan

*Call for Submissions:*

*Non-Profit Community Interest Category*

### **Disposal of Surplus Real Property Submission**

**HALIFAX REGIONAL MUNICIPALITY**

**Prepared by:**

Name, title

Name of Organization

Contact Information

*This business case template is provided as a guideline for submissions; however, it is the responsibility of the Applicant to ensure adequate information is provided to comply with Administrative Order 50, legislative provisions, and HRM bylaws.*

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**Any inquiries related to the application must be directed to:**

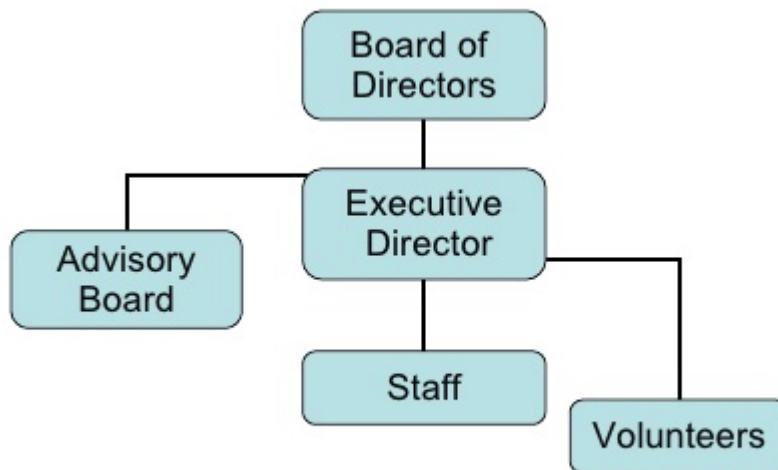
- Peta-Jane Temple, Team Lead Grants & Contributions, Finance and Information, Communication & Technology at: [templep@halifax.ca](mailto:templep@halifax.ca)

# 1. Organizational Profile

This section provides the evaluation panel with important information on the composition of the organization, its purpose, management structure including Board of Directors (list all), a program description, and mission statement (if applicable). Include proof of non-profit registration in your **Attachment A** as well as articles of incorporation in your **Attachment B**. Please be concise.

**Table A – Management Structure Organizational Chart Breakdown (example)**

## Non-Profit XXX



*\*Aside from Board of Directors, please do not include names. The chart does not have to include all employees and can be high-level, but position titles should be included.*

# 2. Intended Use

## Scale and Type of Service

Describe the services that your organization delivers, scale of delivery (relative community impact like number of members, etc.), and describe the benefit you deliver to citizens/residents of HRM. Be specific and include actual or estimated numbers where applicable and possible.

## Purpose

List the services or products your organization is planning to deliver at or from this location, and how the purchase of this property would help achieve this goal.

Please keep in mind the permitted uses for the property as presently zoned are provided in **Section F** “Supplementary Information” of the *Call for Submissions* document. Requirements for the property in question are summarized there. The applicant should ensure their Business Plan complies with zoning requirements.

## Past Experience

Describe any related skills and experience, and previous property ownership or tenancy<sup>1</sup>.

## Successes

List any past projects or successes that might be relevant to the proposed intent of the purchase of real property.

## Financial Plan

Refer to your current financial position, included as **Attachment C**, but make reference to the changes that are expected to revenues, expenditures and cash flow as a result of the purchase of the property and future planned activities. These activities described should be included in financial tables as your **Attachment D**. It is beneficial to list assumptions by category (i.e. user fee revenues, snow removal expense, new staff costs, property taxes, etc.) and associated timing of financial impacts (i.e. Year 1, Year 2, etc.).

In addition, include proposed capital expenditures for the subject property for the next five years as part of your business plan. Any proposed new asset purchases, or, retrofits or upgrades to existing assets should be included. Include a description of why the capital investment is believed to be required, and broadly, how it contributes to the Municipal benefits described below.

## 3. Municipal Benefit

A benefit can be a financial outcome as well as qualitative interests. Applications must sufficiently describe and support the need for programs or services to be offered either on site, or administered from the subject property. Please note any Regional Council priority outcomes that your project proposal is targeting. The application must sufficiently describe the need for the citizens and communities of the Municipality.

The Business Plan will provide more value to the evaluation team if the proposed outcome(s) are described in the form of objectives, or action plans, that you hope to achieve through new property ownership. Please note the annual Regional Council's priority areas can be found at

<http://www.halifax.ca/budget/documents/Operating-DiscussionandAnalysis.pdf> .

### Table A – Example “Non-Profit Club”

*A non-profit club wishes to purchase a plot of HRM land and club house declared “surplus property”.*

Regional Council Priority Outcome	Business Objectives
Healthy Communities → “Inclusive and Accessible Community”	<ul style="list-style-type: none"><li>• Enables a club for persons with disabilities to provide activities free of charge on the premises.</li><li>• Intention to invest <b>\$X</b> or <b>X%</b> over five years in retrofits to make the club house accessible.</li><li>• etc.</li></ul>
Healthy Communities → “Public Safety”	<ul style="list-style-type: none"><li>• Retrofitting will enable safety for the public/members.</li><li>• etc.</li></ul>
Healthy Communities → “Recreation and Leisure”	<ul style="list-style-type: none"><li>• Recreation opportunities for members and at specified times, the general public.</li><li>• etc.</li></ul>

<sup>1</sup> If the applicant has no prior experience, the composition of the Board of Directors or a designated committee, consultant or professional assistance may be used as an alternative.

## Timeline

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Please list all business objectives broken down by the year in which you plan to do them. Include a short description of the steps you intend to take to enable your project to meet its objectives.

## 4. Risks and Disclosures

This is your opportunity to disclose any unconfirmed funding, terms and conditions of third party financing, conditionality of offer, major donors, or past irregularities, if applicable. If there are any risks identified, you may wish to discuss:

- *The likelihood of the risk occurring;*
- *The impact to your organization and the community if the risk occurs.*

## Appendices

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**Attachment A – Non-Profit Registration**

**Attachment B – Articles of Incorporation, if applicable**

**Attachment C – Financial Statements, including supporting Notes to the Financial Statements, if available (Previous years, up to three)**

**Attachment D – Projected Financial Plan, including Capital Expenditures (Future 5-Years related to Business Plan activities)**