



Project Summary

Data Sheet

Who

(Mission of the organization)

What

(Services/products)

Targeted clientele

Main partners

Number of jobs

Prospective sales

1. Identification of promoters (attach résumés)

Last name and first name: _____

Address: _____

Home district: _____

Telephone no.: _____

Email: _____

Relationship: _____

Last name and first name: _____

Address: _____

Home district: _____

Telephone no.: _____

Email: _____

Relationship: _____

Last name and first name: _____

Address: _____

Home district: _____

Telephone no.: _____

Email: _____

Relationship: _____

Last name and first name: _____

Address: _____

Home district: _____

Telephone no.: _____

Email: _____

Relationship: _____

2. SOCIAL ECONOMY ENTERPRISE PROJECT

2.1. Background

Briefly explain your reasons for starting up this enterprise and why the project is important to you. For an existing business, highlight the turning points and significant accomplishments of the corporation.

2.2. Mission

In one sentence, summarize the mission of your non-profit organization.

2.3. Objectives

List your main objectives. An objective must be verifiable. It must have a time limit and be measurable in order to determine whether it has been reached.

2.4. Description

In a few lines, sum up your enterprise as you imagine it. What social issues are behind it? What is its philosophy and vision? What does or what will your enterprise look like overall?

2.5. What makes your enterprise a social economy enterprise?

Explain how your enterprise responds to social economy criteria.

2.6. What steps have you undertaken to develop your enterprise?

List the steps accomplished, the people you have met with to date as well as the steps that remain to be undertaken.

2.7. What partnerships have you formed and what new ones do you intend to develop?

Name your partners and how they provide their services. Attach letters of support.

2.8. Where will your enterprise be located and why have you chosen that location?

Demonstrate the synergy that the location has with its environment, if relevant.

2.9. What positive effects will your enterprise have in its environment?

Present the project's impact on the area (social, environmental...)

3. MANAGEMENT TEAM

3.1. Presentation of the management team and its expertise

This section provides a description of the directors and management. It is important to describe the pertinent experience of both with respect to the project, their educational training, their management experience, their personal and professional achievements. It is essential to include the résumés of the President and Manager.

You must provide a list of directors and describe their strategic roles within the Board of Directors.

4. DESCRIPTION OF THE SOCIAL ECONOMY ENTERPRISE

4.1 Description of services/products offered

Describe the service(s)/product(s) that you wish to offer to customers:

4.2 Analysis of the environment

You must be aware of the context and trends in your sector of activities in the following areas:

- Political: government department priorities, etc.
- Legal: applicable laws and regulations, etc.
- Social: determine if the need has also been identified by individuals, groups, other organizations or businesses, etc.

Describe the area served (borders and total population of the area).

Using this information, observations made and meetings attended, you will be able to briefly analyze the context of your sector of activity based on facts.

4.3 Analysis of the clientele

The main objective of this section is to measure and estimate the needs of the clientele to determine whether your project is realistic and if it responds to the demands of funding agencies.

Describe the profile of your priority clientele. The following examples will help you define your clientele: their characteristics, their particular needs, their income levels, their education levels, ages, gender, where they live, their professions, etc.

You will thus be able to predict the number of customers you will serve, the number of potential customers and how your business will respond to needs in the community.

4.4 Analysis of the competition

Here it is important to be aware of what other businesses are doing so as not to duplicate services offered to the community in the same area. If your business provides services similar to those offered by other organizations, the following are a few questions to ask yourself:

- What do you offer that sets you apart from other services of the same type? (added value)
- What is your complementarity?
- What is your positioning?

4.5. Pricing policy

Pricing policies must be detailed, i.e., the price established for the product or service (taking into account the costs, competition, and customers' ability to pay) and conditions of payment (e.g., payment deadlines for customers and suppliers).

5. PROMOTION OF SERVICES

5.1 Advertising

Explain how you will ensure that your customers, partners and funding agencies know about your service (e.g., through newspapers, magazines, Web sites, television, radio, press releases, displays, etc.).

6. HUMAN RESOURCES

6.1. Human resources

List what is required with respect to human resources for the project, i.e., the number of jobs (created and consolidated) planned at the beginning, the number of jobs generated in the two first years of the project, the qualifications required.

6.2. The quality of jobs

Specify the conditions of work, the pay scale and the benefits provided. In addition, the jobs created should provide, as much as possible, possibilities for personal and professional development.

6.3. Division of tasks

These must be detailed in order to evaluate the role of each employee in the organization, demonstrating the coherence of the choices retained with respect to objectives and limitations inherent to the project. The organization of tasks thus defined should also include job titles.

7. KEY FACTORS FOR SUCCESS

7.1. What are the various elements that will make your project a success?

8. FINANCING SOURCES

8.1. Project and financing

Describe the investment project and its financing requirements and present the financing package by indicating the amounts confirmed and those to come.

Indicate what kind of action from the CDEC is required (what it specifically finances)

PROJECT		FINANCING	
Equipment		Investment	
Furnishings		Financial institutions	
Improvements to the rental premises		Sponsors	
Working capital		Donations	
Vehicles		Grants	
Registration		Other	
TOTAL		TOTAL	

8.2. Financial viability of the enterprise

The financing of a social economy enterprise often rests on the combined and complementary contribution of several partners from a variety of sectors. It is therefore important to specify the sources of financing that the promoter group can count on. Please complete Appendix 1.

APPENDIX 1

CASH BUDGET (YEAR ONE)

RECEIPTS	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	TOTAL
Sales													
Grants													
Donations													
Sponsorships													
TOTAL RECEIPTS (A)													

EXPENSES	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	TOTAL
Salaries													
Owner-managers' salaries													
Employees' salaries													
Benefits													
Total salaries													
Rent													
Electricity and heat													
Telephone													
Computer													
Office furnishings													
Insurance													
Professional fees													
Bank charges													
Advertising and promotion													
Travel													
Other													
TOTAL EXPENSES (B)													

RECEIPTS – EXPENSES (A-B)													
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CASH BUDGET (YEAR TWO)

RECEIPTS	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	TOTAL
Sales													
Grants													
Donations													
Sponsorships													
TOTAL RECEIPTS (A)													

EXPENSES													
Salaries													
Owner-managers' salaries													
Employees' salaries													
Benefits													
Total salaries													
Rent													
Électricity and heat													
Telephone													
Computer													
Office furnishings													
Insurance													
Professional fees													
Bank charges													
Advertising and promotion													
Travel													
Other													
TOTAL EXPENSES (B)													

RECEIPTS – EXPENSES (A-B)													
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CASH BUDGET (YEAR THREE)

RECEIPTS	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	TOTAL
Sales													
Grants													
Donations													
Sponsorships													
TOTAL RECEIPTS (A)													

EXPENSES													
Salaries													
Owner-managers' salaries													
Employees' salaries													
Benefits													
Total salaries													
Rent													
Electricity and heat													
Telephone													
Computer													
Office furnishings													
Insurance													
Professional fees													
Bank charges													
Advertising and promotion													
Travel													
Other													
TOTAL EXPENSES (B)													

RECEIPTS – EXPENSES (A-B)													
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