

# Action Plan

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## To be completed by the organisation

Organisation	CSN Community Pub Limited
Adviser	Viv Price
Date of completion	27/11/2020

## Action Plan:

Task No	Task Description	Start Date	Completion Date	Person responsible	Status
1	<b>Kick Off 'Save the Dragon' Campaign</b> <i>Start Facebook group to attract members and raise awareness.</i> <i>Engage local media to announce formation of campaign</i> <i>Engage local community and keep informed of progress</i>	14/09/2020	30/09/2020	Dave Crossman	Complete
2	<b>Tender for Plunkett Foundation support for Action Planning.</b> <i>Complete application for Plunkett Foundation support</i>	01/10/2020	30/10/2020	Dave Crossman	Complete
3	<b>List The Green Dragon as an Asset of Community Value (ACV).</b> <a href="https://mycommunity.org.uk/take-action/land-and-building-assets/assets-of-community-value-right-to-bid/">https://mycommunity.org.uk/take-action/land-and-building-assets/assets-of-community-value-right-to-bid/</a> <i>Keep owner informed on progress.</i> <i>Once registered, Parish Council must express an interest to bid in writing within 6 weeks to SSDC. This gives us 6 months to bid.</i> <i>Inform community on progress and key decisions made.</i>	01/10/2020	18/11/2020	Parish Council (supported by Dave Crossman)	Complete

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4	<p><b>Consult with the community.</b></p> <p><i>Activities to complete:</i></p> <ul style="list-style-type: none"> <li>• Conduct survey</li> <li>• Produce analysis of results</li> <li>• Use analysis to produce VISION for the business.</li> <li>• Summarise for Business Plan</li> <li>• Test Vision with community</li> <li>• Produce calendar of Community events.             <ul style="list-style-type: none"> <li>○ via open meetings, events and community consultations</li> <li>○ Regular updates in Parish News, Facebook etc.</li> </ul> </li> </ul> <p><i>Inform community on progress and key decisions made.</i></p>	14/09/2020	30/10/2020	Steering Group	Complete
5	<p><b>Form initial Steering Group</b></p> <p><i>Select initial Steering Group members based on feedback from survey.</i></p> <p><i>Inform community on progress and key decisions made.</i></p>	19/10/2020	30/10/2020	Dave Crossman	Complete
6	<p><b>Develop Action Plan.</b></p> <p><i>Develop Action Plan to define project aims and the activities that need to be completed.</i></p> <p><i>Once complete, submit Action Plan to Plunkett for review and approval. May be invited to apply for further Plunkett support.</i></p> <p><i>Inform community on progress</i></p>	02/11/2020	27/11/2020	Steering Group	Complete
7	<p><b>Decide on Society legal structures.</b></p> <p><a href="https://plunkett.co.uk/wp-content/uploads/Brief-Guide-to-Legal-Structures-March-2016.pdf">https://plunkett.co.uk/wp-content/uploads/Brief-Guide-to-Legal-Structures-March-2016.pdf</a></p> <p><i>Activities to complete:</i></p>	02/11/2020	27/11/2020	Steering Group	Complete

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	<ul style="list-style-type: none"> <li>• <i>Develop Pros and Cons of each, summarise for Business Plan</i></li> <li>• <i>Steering Group vote on preferred option</i></li> <li>• <i>If using Plunkett model Rules review and confirm any changes required</i></li> <li>• <i>Vote on joining Plunkett Community Business Network membership.</i></li> </ul> <p><i>Inform community on progress and key decisions made.</i></p>				
8	<p><b>Raise start-up funding to cover initial due diligence costs.</b></p> <p><i>Activities to complete:</i></p> <ul style="list-style-type: none"> <li>• <i>Plunkett Community Business Network membership registration</i></li> <li>• <i>Business Buyers Report</i></li> <li>• <i>Registration of the legal structure</i></li> <li>• <i>Communication costs</i></li> </ul> <p><i>Inform community on progress and key decisions made.</i></p>	02/11/2020	30/11/2020	Steering Group	Complete
9	<p><b>Appoint Officers for Steering Group</b></p> <p><i>As a minimum, elect the following Officers - Chair, Secretary, Treasurer (roles are needed to register. Vice Chair useful. Recruit others with skills for the project. Sub groups are fine.</i></p> <p><i>Inform community on progress.</i></p>	20/11/2020	14/12/2020	Steering Group	Complete
10	<p><b>Assess viability of the project and develop a formal feasibility plan.</b></p> <p><i>Consider the following:</i></p> <ul style="list-style-type: none"> <li>• <i>Community support (may include financial)</i> <ul style="list-style-type: none"> <li>○ <i>Consider a 'pledge' form for shareholders (members) to gauge financial support from the community.</i></li> </ul> </li> </ul>	02/11/2020	15/01/2021	Steering Group	In work

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	<ul style="list-style-type: none"> <li>• <i>Viability of the business by commissioning Business Buyers Report</i></li> <li>• <i>Financial plan (is it feasible)</i></li> <li>• <i>Time Scale – set a date for opening and work backwards</i></li> <li>• <i>People prepared to be involved and drive the project.</i></li> </ul> <p><i>Inform community on progress and key decisions made.</i></p>				
11	<p><b>GO / NO GO Meeting.</b></p> <p><i>Hold formal meeting to determine whether to proceed with the project based on the feasibility plan.</i></p> <p><i>Assuming GO decision, complete application for further Plunkett Foundation support</i></p> <p><i>Inform community on progress and key decisions made.</i></p>	18/01/2021	22/01/2021	Steering Group	
12	<p><b>Register legal structure</b></p> <p><i>Complete FCA Application form and the Model Rules paperwork, send to Advisor to check, send to Plunkett for final review and submission to FCA, with payment of £310. Allow 4 weeks for registration</i></p> <p><i>Inform community on progress and key decisions made.</i></p>	25/01/2021	19/02/2021	Steering Group	
13	<p><b>Set up bank account for Society.</b></p> <p><i>Research Bank accounts and decide on preferred option. Complete paperwork.</i></p> <p><i>Once registration of company complete send paperwork to chosen bank. This can take 6 weeks to process and obtain a bank account.</i></p>	08/02/2021	02/04/2021	Steering Group	

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	<i>Inform community on progress and key decisions made.</i>				
14	<p><b>Develop fundraising strategy including; community finance, loans and potential grants.</b></p> <p><i>Consider the following:</i></p> <ul style="list-style-type: none"> <li>• <i>Local fundraisers - keeps project evident</i></li> <li>• <i>Grant funders - research regularly (sign up to notifications) Check eligibility, (do not apply unless meet all criteria. Check submissions carefully any omissions/errors may mean grant refused.</i></li> <li>• <i>Don't assume all applications will be successful</i></li> <li>• <i>Google Grant funders + county</i></li> <li>• <i>Can take many months as often grants only open for short time.</i></li> <li>• <i>Consider Enterprise Investment Scheme - needs prior approval by HMRC. Be aware this may mean other funders will not support the project. Can take several weeks to hear.</i></li> <li>• <i>Consider Share Issue, timing, cost of shares, minimum holding, and target amount. Opening and closing date.</i></li> <li>• <i>Most groups use a mix of funding sources</i></li> </ul> <p><i>Inform community on progress and key decisions made.</i></p>	30/11/2020	16/04/2021	Steering Group	
15	<p><b>Obtain detailed costings for works required to the premises.</b></p> <p><i>Allow a contingency.</i></p> <p><i>Ensure everything is included (more than one quote for extensive works).</i></p>	25/01/2021	12/03/2021	Steering Group	

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	<p><i>Funders will not usually consider unregistered groups</i></p> <p><i>Inform community on progress and key decisions made.</i></p>				
16	<p><b>Write Impact Plan include the social impact of the project.</b></p> <p><i>Use ideas in Action Plan and the ideas in the community consultation Better form of Business.</i></p> <p><i>Include social impact of the project.</i></p> <p><i>Inform community on progress and key decisions made.</i></p>	25/01/2021	12/03/2021	Steering Group	
17	<p><b>Write Business Plan.</b></p> <p><i>Make it yours. Basic advice on the Plunkett website.</i></p> <p><i>Key tips:</i></p> <ul style="list-style-type: none"> <li>• <i>Don't be too 'wordy'</i></li> <li>• <i>Ask Advisor for examples</i></li> <li>• <i>Figures are very important and must be realistic. Improvements need to be costed, often essential and in the future.</i></li> <li>• <i>Figures can come from other pubs, contacts, etc. Business Buyers report will have some.</i></li> </ul> <p><i>Consider Share Issue Documents</i></p> <ul style="list-style-type: none"> <li>• <i>These are part of the Business Plan and should consist of a Business Plan summary and the legal requirements of the share issue.</i></li> <li>• <i>Decide how long to run offer.</i></li> <li>• <i>Obtain more details from Advisor.</i></li> </ul> <p><i>Consider Standard Mark</i></p> <ul style="list-style-type: none"> <li>• <i>This is voluntary but if you are raising more than £50k, it should be</i></li> </ul>	25/01/2021	02/04/2021	Steering Group	

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	<p><i>considered as it gives reassurance to your investors. Allow 4 weeks to achieve Standard Mark. Obtain more details from Advisor.</i></p> <p><i>Inform community on progress and key decisions made.</i></p>				
18	<p><b>Develop tenancy agreement and define selection criteria for preferred tenant.</b></p> <p><i>Obtain examples of existing agreements from other community pubs and from MJ Hughes.</i></p> <p><i>Write up head of terms tenancy agreement that outlines all the conditions and covenants of the lease.</i></p> <p><i>Write up profile of the type of operation the local community want to see run at the Community Pub. This will help define the selection criteria for the type of tenant required which will assist when recruiting.</i></p> <p><i>Inform community on progress and key decisions made.</i></p>	05/04/2021	28/05/2021	Steering Group	
19	<p><b>Conduct local fundraising events</b></p> <p><i>Run events as per fundraising strategy.</i></p> <p><i>May continue beyond making an offer to purchase.</i></p>	04/01/2021	28/05/2021	Steering Group	
20	<p><b>Apply for loan and grant funding.</b></p> <p><i>This needs to be ongoing throughout the project (once registered).</i></p> <p><i>Need to have Business Plan in place first before commencing activity.</i></p> <p><i>Inform community on progress and key decisions made.</i></p>	04/01/2021	28/05/2021	Steering Group	

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21	<p><b>Launch community Share Issue offer.</b></p> <p><i>This will run for a specific period as defined in the Business Plan.</i></p> <p><i>Need to have Business Plan in place first before commencing activity.</i></p> <p><i>Inform community on progress and key decisions made.</i></p>	05/04/2021	28/05/2021	Steering Group + Plunkett Foundation	
22	<p><b>Hold first Annual Members Meeting for The Green Dragon Community Pub Society, disband the Steering Group and elect the Management Committee.</b></p> <p><i>Ensure Management Committee of more than 3 people appointed.</i></p> <p><i>Must as a minimum Elect the following Officers - Chair, Secretary, Treasurer (these are needed to register. Vice Chair useful. Recruit others with skills for the project not too many on main committee as meetings can become difficult. Sub groups are fine.</i></p> <p><a href="https://plunkett.co.uk/wp-content/uploads/How_to_Set_up_a_Community_Business_Jan_2018.pdf">https://plunkett.co.uk/wp-content/uploads/How_to_Set_up_a_Community_Business_Jan_2018.pdf</a></p> <p><i>Inform community on progress and key decisions made.</i></p>	31/05/2021	04/06/2021	Steering Group	
23	<p><b>Write business policies for the Society and the Pub.</b></p> <p><i>Examples from Adviser and on Plunkett website.</i></p>	03/05/2021	28/05/2021	Management Committee	
24	<p><b>Make an Offer and purchase the Pub</b></p> <p><i>If willing seller make an offer. Complete legal process for sale.</i></p>	31/05/2021	03/09/2021	Management Committee	



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	<p>Talk to Environmental Health to ensure meeting legal requirements for food sold from the kitchen.</p> <p><a href="https://www.hse.gov.uk/simple-health-safety/workplace-facilities/welfare.htm">https://www.hse.gov.uk/simple-health-safety/workplace-facilities/welfare.htm</a></p> <p>Talk to the owner ASAP, cannot make a formal offer until the finances are in place but discussions can be ongoing.</p> <p>Inform community on progress and key decisions made.</p>				
25	<p><b>Complete any mandatory building works.</b></p> <p>Tender for works and appoint contractor. (if minor, use local help. May need Planning 'change of use' Building Regs application)</p> <p>Conduct works.</p>	06/09/2021	29/10/2021	Management Committee	
26	<p><b>Complete any cosmetic building works.</b></p> <p>Tender for works and appoint contractor. (if minor, use local help. May need Planning 'change of use' Building Regs application)</p> <p>Conduct works as required. This action is a nice to have and depends upon available time prior to</p>	06/09/2021	29/10/2021	Management Committee	
27	<p><b>Recruit Tenants.</b></p> <p>Key activities:</p> <ul style="list-style-type: none"> <li>• Consider advertising for expressions of interest for tenants prior to purchase of pub</li> <li>• Once pub under offer, formally advertise vacancy for tenants</li> <li>• Interview</li> <li>• Selection</li> <li>• Signing of head of terms contract</li> </ul>	31/05/2021	30/09/2021	Management Committee	

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	<ul style="list-style-type: none"><li>Insurance needs to be in place when lease is signed.</li></ul> <p>Inform community on progress and key decisions made.</p>				
28	<b>Arrange utilities, Source suppliers and establish opening hours and trading rules.</b>  <i>If connections needed book much earlier, (it can take months).</i>	06/09/2021	29/10/2021	Tenant + Management Committee (as required)	
29	<b>Open the doors – Open house for official opening event</b>	30/10/2021	30/10/2021	Tenant + Management Committee (as required)	

## Further Support:

*Please identify any further support required from Plunkett Foundation.*