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| --- | --- | --- | --- | --- | --- | --- |
|  | Mission | Considering your Organisation |  | Considering your Beneficiaries and Stakeholders | Community need |  |
|  | Governance | Partners |  |
|  | Organisational form | Market |  |
|  | Management | Considering your Potential Income Stream | Funder restrictions |  |
|  |  | Trading |  |  |
|  | People (staff, Trustees, Volunteers) |  | Services |  |
|  | Skills | Considering your Resources |  | Considering your activities | Product |  |
|  | Finance | Location |  |
|  | Space and access | Activity level |  |

**Guidance for completing tool - Trading**

|  |  |  |
| --- | --- | --- |
| **Considering your Organisation** |  | **Considering your Beneficiaries and Stakeholders** |
| **Mission** | How does the activity fit within your mission?What type of trading (Primary / Non-primary / Ancillary)? |  | **Community Need** | How would the income stream respond to beneficiary needs? |
| **Governance** | What governance procedures will be required?Consider policies needed and powers within governing document.What other regulations are there? Any other regulators expectations to fulfil? |  | **Partners** | How will your current partners and future partners respond?What communication needs are required? |
| **Organisation Form** | How will this income stream affect the legal structure of your organisation?Are you a registered charity (to claim Gift Aid)? |  | **Market** | Is there a market for your project/service?Who are your competitors?Have you done market research? |
| **Management** | Which management Structure do you need?Consider trustees as well as senior management. |  | **Funder Restrictions** | How would funder restrictions impact on it? |
|  |  |  |  |  |
| **Considering your Resources** |  | **Considering your activities** |
| **People (staff, Trustees, Volunteers)** | Do you have the right people in your organisation to manage this income stream? |  | **Services** | What services/activities will you be required to deliver?Do you have a marketing and booking system in place? |
| **Skills** | Does your team have the skills?Should you invest in training? |  | **Product** | What products will you need to start developing? |
| **Finance** | What kind of financial management arrangements will be required?Will this provide unrestricted income?Do you need an online payment option? |  | **Location** | Will you work in the same location or somewhere new? |
| **Space and Access** | Do you have the right accessible space for your project? |  | **Activity Level** | What changes in activity level can you expect? |