



MANAGEMENT AND BUSINESS PLAN

3rd party

SUMMARY OF THE ACTION IN ENGLISH

Describe the main features of the action. (1 page)

SUMMARY OF THE ACTION IN NATIONAL LANGUAGE

Describe the main features of the action. (1 page)

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1. Strategic Framework

Summarize the **objectives** of the action considering the SEAP of the municipality (5-10 lines)

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Describe the added value of the action

Describe the **legal framework** and political basis of the action

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2. Description of the action

Describe in few words the topic of the action (5-10 lines)

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Describe in few words the site of the intervention (5-10 lines)

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Describe the **technical features** of the action (1/2 to 1 pages), including:

- Available material (i.e. attach preliminary planning, description of the action in the SEAP)
- Description of the technical parameters
- Technical design
- Technology employed
- Number of interventions
- Preliminary data collection Baseline (BEI, other data)
- Target / beneficiaries

Describe the **IMPLEMENTATION PLAN** of the action (1-2 pages): current situation, activities to be implemented for the purposes of project realization, milestones:

- Survey / Data collection
- Communication Campaign / Scouting
- Dialogue with financial institution - Financial provisions for funding 3rd parties' actions
- Design of the tender
- Awarding of the contract
- Works
- Monitoring

Describe the **project expected results and outputs** (1/2 – 1 Page)

- *Environmental aspects: Produced or avoided carbon emissions; air-water-soil improvement; indirect reduction of emissions through public awareness on energy use, Other environmental costs and benefits. Energy Savings, Energy Production and CO2 savings.*
- *Technical results (Building comfort / Mobility Improvement / other benefits)*
- *Social and political results (local job creation)*
- *Environmental and energy saving: CO2, MWh*

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Describe potential **threats and risks** associated to the project. (1/2 page)

- *Local acceptability*
- *Difficulties in getting funds*
- *Scarce of interest from beneficiaries*
- *Tender unattended*

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3. Financial aspects

Describe the **BUDGET** of the project (1 to 2 pages):

- Location of the assets to be assured within the Budget
- Planned expenses according to the different steps of the project,
- LG budget to implement the action (staff, external staff, printing costs, ...)
- Foreseen benefit in terms of fostered investments

#		Implementation costs (€)
1	Organization (staff)	€
	External expertise	€
	Communication campaign	€
2	Project training	€
3	Dissemination activities	€
4	Monitoring activities	€
Total		€

Please describe the **FINANCIAL FEATURES** of the action

- detailed description of each type of investment,
- the beneficiaries (who will take advantage of the action),
- the investor (who is responsible for the economic resources),

	Type of investment	Investor	Beneficiary	€
	Electrical and thermal devices with more efficient technologies (pumps, lamps, boilers)			€
	Renewable energy plants (photovoltaic and solar thermal systems)			€
	General refurbishment (Structural measures)			€
	Electric transport (e-Bikes,...), loading stations			

Describe **FUNDINGS AND OPPORTUNITIES** (1/2 page):

- the funding schemes,
- incentives or other financial opportunities related to this action
- how they could affect the pay-back time of this action

4. Project management

Describe the **human resources** involved in the action (1/2 page): who is responsible for the project implementation (which department...)

Please describe:

- a. Staff attribution and assignment of responsibilities (one for economic and legal requirements, one for project implementation). If appropriate a working group with local stakeholders is promoted and facilitated.
- b. Specific needs and limitations within the project (Assessment of the needed External expertise, out-sourcing of SEAP action development/supervision).
- c. Involvement of external stakeholders.
- d. Training
 - i. Training of stakeholders
 - ii. Training of internal staff
 - iii. Training of specific staff (i.e. auditors)

5. Schedule

Implementation plan	Mon th 1	Mon th 2	Mon th 3	Mon th 4	Mon th 5	Mon th 6	Mon th 7	Mon th 8	Mon th 9	Mon th 10	Mon th 11	Mon th 12	Mon th 13	Mon th 14	Mon th 15
1. Fund study / Data collection	x	x	x												
2. Dialogue with Municipalities and data collection	x	x	X												
3. Application preparation		x	x												
4. Obtainment of the fund				x	x										
5. Feasibility study preparation						x	x	x							
6. Design of the tender								x	X	x	X				
7. Awarding of the contract												X			
8. Works													X	x	x
9. Monitoring													x	x	x

6. Tender procedure

Describe the **tender procedure and procurement** (1/2 to 1 page). If the type of action and the legislative framework request it, tender procedure and procurement are prepared and launched through the following steps:

- Exploration of possibilities for bundling and tendering works for plants / facilities / energy efficiency works
- Call for participation for buildings and citizens
- Support from the procurement office of the municipality
- Establishment of the evaluation procedures for the selection of tenders
- Establishment of the most adequate type of tender (competitive dialogue, bid, etc.)

7. Project Communication and Dissemination

Describe planned **communication and dissemination activities** (1/2 to 1 page), including:

- internal communication (between different departments and stakeholders directly involved in the project and aiming at ensuring good coordination of activities)
- external communication (with the general public and aiming at promotion and dissemination of the project, obtaining feedback, etc.)

8. Monitoring of Project Implementation

Describe *quality control, control of realized outputs* (1/2 page) highlighting the set of indicators and quality control.

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9. Final Provisions

Describe all the *final provisions of the project* (½ Page)

- *Political commitment for future activities.*
- *Contacts*

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