

Business Plan - Suggested Headings

Front cover page

Contents page with index

Acknowledgements

A one page summary

Date organisation was formed

Area covered by organisation (geographical and thematic)

Status of organisation

Number of staff/employees

Number of volunteers

Brief history of organisation

Brief background to work to be undertaken

NB To be completed after the rest of the business plan is written!!!

The organisation's aims and objectives

No more than four headings as too many will get complicated

A description of the work to be delivered

What it is

Where it will take place

What it will do

Who will do it

What it will achieve and in what timescale

What will you do at the end of the work proposed

Are there any long term outcomes you want for the work? eg, from a basic training project, people may receive a qualification, but eventually they may be able to use the qualification to get a job and remain in employment.

An analysis of the need with evidence of numbers of people to benefit

Why do you need to do the project?

What makes you the best people to do the project?

List any reports with dates and results

Surveys or questionnaires carried out by your own or other organisations to identify need

Figures giving population of area to be targetted and possible beneficiaries

Sort of people to benefit from the project, eg young people, older people, people with disabilities

Options analysis – eg, daycare, residential, location, etc. Why you have gone for this option?

A survey of similar or related services or projects provided by other organisations (or not)

Give details of projects which are active in the area where your work will be

Identify any similarities with your work

Say why your work should go ahead if there are other projects in the area (either geographical or thematic)

A workplan for year one including objectives, methods of achievement and a target to be achieved within a set timetable

Make the timetable for the work realistic

Include all work to be undertaken

Make sure that the work plan ties in with the aims and objectives

Any issues such as planning, other liabilities, listed building consent need to be considered

Date	Work to be undertaken

Details of how you will monitor your achievements

Management structure and committee arrangements

Diagram of management structure

How often does the management committee of the organisation meet?

Will there be a steering committee for the project?

How will staff and volunteers and users report to the committees and how often?

Will you be using questionnaires, verbal feedback, surveys or other means to check on progress?

How will you use this information to modify the project (if necessary)?

Staff and volunteer grievance procedures

A budget or cash flow forecast for each year

Make sure the figures add up for each year of the work

Make sure all the elements of the work are funded to the necessary level

If income is to be generated, make sure the predictions are realistic and not overly optimistic

If a business plan is being produced to complement an application form, make sure the figures are the same in both

Use the budget structure in the application form (if used) to form the basis for expanded information in the business plan

Include inflation, contingency and VAT if necessary

A Fundraising plan with key dates

Be realistic about the amount of money you need to raise for the work

Can the community support the fundraising needs of the work, or will there be funding fatigue due to other commitments or projects?

Ensure that any grant applications fit the timescale of the work

Make sure you have the people to do the fundraising required and mention their skills and experience

Take advice on funding sources from appropriate people

Be certain that you have enough money to cover any problems or difficulties such as having to re-recruit, extra training costs, etc.

What will you do once the grants have run out?

A Marketing plan with key dates

Make sure the publicity for the work ties in with the activities planned

Use the resources available locally wherever possible and list these, eg, radio, newspaper, newsletters

Ensure that the marketing plan will enable you to reach your target group of people

A summary of your organisation's track record for delivering similar projects

List any previous projects and give dates and achievements, including numbers of people participating

If you have no previous projects which are similar, ensure you give some details of successful projects

Staff requirements, including the skills of key people involved in the work

Ensure that the staff requirements for the work listed in the business plan tie in with job descriptions

Is there the management in place to support the staff?

Is there the administrative support in place for the new staff?

Disciplinary procedures

Working with children or vulnerable adult requirements (if any)

Exit strategy

Is the work time limited, or will it carry on?

Will the work need further funding once the first stage is completed?

Can the work be delivered in a different way after the grants have finished?

Will the work come to a natural end? For example, a village hall refurbishment will be completed, but there will need to be maintenance and ongoing work to ensure continued use.

Appendices

Policy documents

Plans

Options appraisals

Job descriptions and person specifications

Survey or consultation results

Questionnaires

Procedural documents