



T3SC Factsheet

Business planning

A Business Plan helps you think through all aspects of your organisation and plan for the future. It helps you get an overview of your organisation, and is a useful tool for presenting yourself to funders and supporters. A Business Plan may be for your whole organisation, or for a particular project or part of your organisation (when it is sometimes called a Project Plan). Below are the common points that are usually in a business plan - add sections that you think are appropriate. Always make sure it is clearly written, that you discuss it with appropriate people and that any costs are based on real costs.

An executive summary

Brief outline of mission, values and context. It should highlight the proposed direction, key benefits and make the case for the organisation, a one page three minute read. No more than one page, highlight key messages

Introduction and mission

The mission statement in full. Explanation of purpose and duration of the plan. What is the organisation for? What does it stand for? Vision and values? Outcomes?

The organisation's background

A brief history of the organisation, its legal status and registered office. You need to include basic and factual information to help readers get a picture of your organisation. Factual information only

A summary review

A short review of the organisation to date. Stress strengths, achievements and external recognition to date. Readers may expect to see some honest appraisal of weaknesses. A SWOT analysis is often used to display this information:

S = Strengths

W = Weaknesses

O = Opportunities,

T = Threats

Need to show that you have looked objectively at the organisation.

Future trends

An outline of how the organisation sees its future environment developing. Refer to likely needs of users. The plan needs to show that thought has been given to likely external developments. Show that the organisation is outward looking and has a good understanding of the context.

Strategic Direction

What assumptions underpin the chosen direction? What will be the main direction of the organisations work? What will be its main priorities? What will be different? Shows that the organisation is focused.

Strategic Aims

Statement of aims for the medium term. The specific objectives for each aim could be listed or a brief summary of them given. Outline plans to guide the delivery of the plan.

Implications

Areas of work that will be dropped or phased out should be noted. Organisation, legal or any other key implications should be listed here. How will the organisation need to develop or change in order to meet the plan?

Financial implications

How will the plan be funded? Income and expenditure projections for first year and estimates for following years. Listing of financial assumptions behind the plan. Statement of key financial policy (e.g. pricing policy) and evidence of efficient management. (e.g. cash flow forecast) That the organisation is taking a strategic approach to funding.

Track record of organisation

Making the case for the organisation. Showing that it has the management competence and experience necessary to manage the plan. The past experience of the organisation and its key personnel could be listed. A list of critical success factors. Show that it can deliver.

Immediate action plan

Times action for the first steps in the plan. The next steps are clear. The best Business Plans are a joint effort, carried out in consultation with staff, management and other interested parties. A plan will work best with the input and support of the people who will be expected to make it happen!

Information from: 'The complete guide to Business and strategic planning for voluntary organizations,' Alan Lawrie, Directory of Social Change 2007

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