#### BUSINESS PLAN TEMPLATE

Business Plan For:

Organisation Name:

Primary Contact:

Physical Address:

NPO registration:

Telephone:

Website:

Email address:

**LOGO**

#### TABLE OF CONTENTS

Executive Summary – pg.

Products, Programs and Services – pg.

Marketing Plan – pg.

Operational Plan – pg.

Impact Plan – pg.

Financial Plan– pg.

Appendix – pg.

#### EXECUTIVE SUMMARY

The first page, your executive summary, should describe your organisation’s mission and purpose, summarise your market analysis that proves an identifiable need, and explain how your organisation will meet that need.

It should answer questions like:

* What is your history? What is your mission and vision?
* What cause are you contributing to?
* How are you planning to achieve your purpose?
* What will be your primary product, project or service?
* How are you going to finance your activities?
* If you are applying for financing, how are you going to use the money?

Start the organisation description with a mission statement. If you followed Step 2 of our step-by-step guidelines, this should be easy.

Other items you could consider including in the Executive Summary are:

* Organisation Strengths

Discuss what sets your organisation apart from others. Answer questions such as: What are the strengths of my organisation? What are the strengths of my team? How will these strengths fit in with my target group?

* Legal Form

Disclose your legal structure and make note of why you selected this particular legal structure.

The executive summary should be concise, precise, and complete. It also needs to be eye-grabbing.

#### PRODUCTS, PROGRAMS AND SERVICES

Use this section to describe, in depth, the products and/ or services your organisation will offer. This can include a variety of additional information, for example:

* Description of your current project(s) activities
* Description of project(s) or classes you’d like to run in the future
* Illustrations and graphics (used only to support or reinforce a particular point)
* Photos documenting your work

Other information that you could include in this section:

* How do your services/projects/ classes make a positive change?
* Service/ project comparison

Every service/project you offer must be documented in detail, complete with their funding sources and benefits.

#### MARKETING PLAN

Due to the length of this section, many organisations choose create a separate marketing plan. However, it is still important to include a brief version of the marketing plan in your organisation’s business plan.

Below are four factors to include the marketing section of your business plan:

#### Needs analysis (Market Research)

Explain the need in your community – in other words the need for your organisation’s services. Explain your niche: the need in the community you are helping address, as well as facts and statistics that document the need.

* Primary research - With primary research, you gather and present your own data.
* Secondary research - With secondary research, you rely on published information.

#### Target group (Constituency)

Identify your target group (beneficiaries), including their location, characteristics, and needs. Who do you serve? What outcomes do they experience as the result of your services? For each group, you should create a demographic profile which may include:

* Age
* Gender
* Location
* Income
* Occupation
* Education
* Any other details specific to your organisation

#### Competitors and Collaborators

Answer these two primary questions:

* Which organisations offer the same or similar services – your competition?
* Which organisations are potential collaborators/ partners/ supporters?

When answering these questions, be as specific as possible. Just like a for-profit enterprise, you may have to compete with other organisations that serves your target group. There are only so many donors, sponsors, and volunteers to go around.

#### Strategy

As the name implies, this is where you explain how you will market your products, projects and services. This section can include:

* Marketing activities – website, social media, print media, etc
* Marketing budget
* Marketing methods at different stages of the organisation: start-up, growth, etc.

This section is also where you detail how you plan to raise awareness for your cause. You could also include, if the space allows:

* Do you already have a local foothold (do you already have a group of students, partner organisations, etc)?
* Who will be managing your marketing activities?
* Examples of past campaigns and their effectiveness, if relevant.

#### OPERATIONAL PLAN

This is an opportunity to discuss the day-to-day operation of the organisation, including employees, processes, location, and other related details.

Your operational plan should focus on the following:

* Location: the offices, amount of space required, and if your team will work on site.
* Legalities: registrations, accreditations, etc.
* Governing structure: do you operate with a Management Board, a Steering Committee, professional consultants? What are their roles?
* Organisational structure: A separate portion of this section should explain staff roles, with a breakdown of who handles specific responsibilities. Also highlight the number of employees, type of employees, pay structure, employee responsibilities, and the use of independent consultants/ trainers.

#### IMPACT PLAN

Clearly outline how your organisation will achieve your mission/vision/purpose. Your impact plan should answer the following questions:

* What change are you seeking to create?
* What goals are most meaningful to the people you serve or the cause you’re fighting for?
* How can you best achieve those goals?
* What are the specific objectives you’re going to achieve?
* How are you going to measure the change you’re creating?
* How will you use what you learn?
* How will you tell people about it?

#### FINANCIAL PLAN

While there is no guarantee that things will always go as planned, this section will help estimate the financial future of your organisation.

The financial plan should include the following:

* Summary of your past and future: o Cash Flow Statements
  + Balance Sheets
  + Income Statements
* A budget addressing your organisational expenses, including salaries.
* A list of all potential income (and sources) and an explanation for your fundraising activities to secure these.
* Any planned capital expenditure (purchasing a car, building etc), and existing debt.
* How will you deal with unexpected expenses, or “overspend”?

#### APPENDIX

Some documents you may want to include in your appendix resumes of key staff, board member lists, pertinent charts and graphs, promotional material, strategic plan, mission and vision statements and annual report. You could include more specifics of management qualifications, letters of endorsement, or details of your market research. You could also include your organisation’s operational and financial structure: organogram, current and/ or projected budget, your tax clearance certificate, balance sheets, etc.

These documents will vary depending on the exact nature of your organisation. Be careful not to simply add documents in order to make your document seem fuller – a maximum of 5 pages per supporting document should be more than enough.