



Community & Voluntary Service

Mid and North Bedfordshire

How to Produce a Development or Business Plan for Your Organisation

A Development or 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 Development or Business plan may be for the whole of your organisation or for a particular project (when it is sometimes known as a Project Plan). It is important that more than one person is involved in writing the plan so as to ensure that it is a collective vision of the organisation.

A plan can help motivate and make clear how staff and work fits in with an organisation's aims. It is also essential for funding applications.

Below are the main areas that are usually covered by a business plan. However, feel free to add further sections that you may feel appropriate. Always make sure that it is clearly written, that you discuss it with appropriate people and that any costs are based on real costs:

1) A Summary of the Development or Business plan

This should be a short introduction, summing up the main points of the plan and introducing the project in an appealing way. You may find it easier to write this section of the business plan after the other sections are completed.

2) The Background/History of your organisation

In this section you should outline:

- details of your legal status
- your aims and objectives
- how long you have been established
- how you are managed
- past achievements

3) The Need for the Services Offered

You need to provide a brief outline of the activities of your organisation or project. You could include evidence of this need, such as research, reports or client feedback.

4) Aims and Objectives of the Project

In this section of the Development or Business plan you should cover in more detail what your organisation or project sets out to achieve. These will be your aims.

Aims:

It is probably not a good idea to have more than 6 aims. An example of an aim might be:

- *'To provide a variety of ways for people to understand the lives of disabled people through the media of art, drama, training and education'.*

Aims lead to outcomes - the benefits that will be achieved. For the above aim an outcome might be:

- *'Local people will gain a greater insight into the lives and experiences of disabled people'.*

Objectives:

You should then develop the aims by outlining a series of objectives relating to each aim.

Objectives are the pieces of work or the tasks needed to achieve the aims. Each aim will have several objectives. An example of an objective for the above aim might be:

- *'To produce performances based on the lives and experiences of disabled people'.*

Objectives will have targets (sometimes called 'outputs') – realistic numbers that you expect to achieve.

5) A Work Plan

The Work Plan gives details about each of the above tasks:

- When they will be done?
- Who will do them?

A Work Plan can be used by the management committee and staff to monitor progress.

6) Budget and Cashflow Forecast

From the planning you have already done, you are now in a position to decide what resources you will need to carry out the work. You need to give details about all the implications of the resources required. The best way of doing this is by creating a Budget and Cashflow forecast, including accurate costings.

Resource implications might include:

- **Staff** - How many staff hours will this work need? What staff will you need to deliver this work? On what salary or wage?
- **Work Space and Equipment** - Think about where you will carry out all your activities. Do you need to buy a building or rent space? What equipment do you need to run an office and your activities? Is the space accessible to everyone?
- **Office Costs** - Bills like telephone and mailing costs, heating and lighting. Also remember to include the costs of consumables such as paper and envelopes.

A Budget can be created when you have got the costs and quotes for the above. A 3 year Budget is usual with all predicted outgoings and income. This should be combined with a Cashflow Forecast, which looks into the timing of cash flows in and out of the organisation to make sure that you always have enough funds when needed.

For more information see information Sheet: Budgets and Cashflow Forecasts.

7) Promotion and Publicity Plan

How will you advertise what you do to everyone who could use your services? How will you make sure no one is excluded? How will you promote yourself to supporters, partners and potential funders?

8) Management

It is always a good idea to include a diagram of your staffing structure. Make sure people are clear what their roles are. Who will have responsibility for what? Who will people report to and get supervision from?

If the Development or Business plan is for a specific project you may want to include job descriptions for the new roles.

9) Monitoring and evaluation

How will you measure the success of the organisation or project? How will you make sure you reach the targets you have set? How will you collect information about the work that you are doing? Who will do this and when? How will this information feed into ongoing improvement of the project?

Before you start you need to have a clear framework outlining the targets relating to what you want to achieve, both quantitative and qualitative. Think about what you are measuring and why.

Only collect necessary information. You should consider:

- What information you need to collect to measure whether or not you are meeting your targets
- How you will collect that information
- Who will collect it
- When it will be collected
- How it will be collected

10) Conclusion

The best Development or Business Plans are joint efforts, carried out in consultation with staff, volunteers, 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!

11) Further Help

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The Cranfield Trust - The Cranfield Trust provides free management support to voluntary organisations involved in issues of poverty, disability or social exclusion - www.cranfieldtrust.org.uk

Reference Books:

- **The Complete Guide to Business and Strategic Planning for Voluntary Organisations** – Alan Lawrie – Directory of Social Change – www.dsc.org.uk - £18.95
- **Tools for Tomorrow - A Practical Guide to Strategic Planning for Voluntary Organisations** – C Copeman, I Bruce, A Forrest, R Lesirge, P Palmer & A Patel - www.ncvo-vol.org.uk/publications - £35.00

CVS – Mid & North Beds have the aforementioned books in our reference library & they can be loaned to CVS members

This is one in a series of fact sheets produced by CVS – Mid & North Beds, on subjects of interest to voluntary and community groups. It is intended for guidance only and is not a comprehensive statement of the law.