

Organisation name

Business Plan: (20XX – 20YY)

Date

Executive Summary

(This should be written last)

This is your opportunity to make a great first impression and grab the reader's attention. The exec summary will usually include a summary of the following information:

NOTE: *this content should be kept at a very high level- i.e. an introductory summary to the rest of the document.*

- Brief description of the organisation (established, location, legal structure etc)
- Theory of problem statement
- Theory of change (solution theory)
- Vision
- Mission
- Strategic aims
- Core activities
- Social impact goals/ targets
- Operational targets
- Financial projections

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Part 1: Introduction and purpose of the document

The purpose of this section is to set the scene for the reader by providing an introduction to the organisation and explaining the purpose of the business plan.

The introduction should include a brief description of the organisation, including information such as; when the organisation was established, founder, geographical location, legal structure, brief history etc.

The 'purpose of the document' should explain why you have produced this plan, for example; to secure seed funding, raising finance for growth etc).

Finally, you should introduce the structure of the document (the 6 core parts) explaining the purpose of each part (e.g. *Theory of the Problem: sets out the social problem the organisation is seeking to address*). This should also include a brief description of the 'social change model' - providing the framework for defining your organisations social model.

Part 2: Theory of the Problem

Part 2 of your business plan should outline the problem (social, environmental) that you are setting out to solve / alleviate. This will typically require you to include the following information:

- The current state & the goal state:
 - **Current State:** *What is the **current situation** (or state) of the problem you have identified?*
 - **Goal State:** *What is the end, **goal state** or condition that would result if the problem was solved?*

- The **context** behind this problem? (environmental analysis):
 - Who is experiencing this problem and what are their typical experiences?
 - What is the scale of the problem?
 - Why does this problem exist?

- **Your theory of the problem statement**

Relevant themes

- Social Model

Part 3: Strategy

Part 3 of your business plan should outline your strategy for addressing the social/ environmental problem (the social model), followed by an explanation of how this translates into your strategy. With this in mind, you should aim to include a summary of your theory of change, theory of action and overall strategy, (including a summary of core objectives and outcomes).

Theory of Change

The solution theory (*your strategy*) to addressing the problem defined in part 2. This should include:

- **Proposed interventions and outcomes:** Define and map your 'pathway of change'; the 'cause and effect' links that connect your high level interventions to your outcomes, and your outcomes to the alleviation of the problem(s) experienced by your target population.
- **Assumptions:** clear documentation of the assumptions made within this solution theory- the connections between the interventions and the outcomes. Where possible, evidence should be provided to justify these examples; from research, personal experience or experiences from a similar organisation.

Theory of Action

Defining the specific activities or actions that will enable you to deliver your solution to the problem. This should include:

- **Core actions:** Articulating the theoretical interventions outlined in you theory of change, e.g. *how will you provide support to migrants and refugees around employment/ civic rights and entitlements.*
- **Support actions:** additional interventions that may be required to enable your organisation to deliver its core actions.

Strategy

This section should provide the reader with a high level summary of your strategy, illustrating how the activities defined in your social model (above) will enable you to deliver your organisations overall mission. This section should therefore include:

- **Your vision statement:** articulating the long term goal that the project or organisation aims to realise.
- **Your mission statement:** a clear and simple summary of what you do and why you do it- focusing on providing the reader with a brief insight into the internal workings and objectives of your project.
- **Values:** a set of values that act as guiding principles around how a project or organisation will operate.
- **Core activities/ actions:** Defined in your theory of action. For each activity, include a summary of the following:
 - Core objective
 - Short/Medium/ Long term outcome goals (using your defined outcome indicators)
 - *You may want to consider using a logic model or similar framework to structure this information.*

Relevant themes

- Social Model
- Business Model

Part 4: Operations

Part 4 of your business plan should outline the detail behind how you plan to deliver the strategy as detailed in Part 3. This section is typically separated into a number of sections, reflecting the operational plan for each of your organisations core activities/ actions:

For each core activity/ action, you should aim to summarise the following information:

- **Purpose / objective of the activity:** how do you define success for this activity?
- **Key output goals:** operational goals using your output indicators
- **Key steps / actions:** what are the headline (3-5) actions which, in aggregate, would define how this activity takes place from day to day?
- **Capabilities / skills / knowledge required:** what human expertise is required to deliver the activity successfully?
- **Key inputs:** what other things need to happen for this activity to be successful?

Relevant themes

- Business Model
- Organisation, Operations and Infrastructure

Part 5: Marketing:

Part 5 of your business plan should define your marketing strategy and marketing plan.

Marketing Strategy:

Your marketing strategy should define:

- Your **position in the market landscape**- how does your value proposition compare to your competitors?
- Your **'routes to market'**- how will you reach the target audience with your value proposition?
- **Communicating your value proposition**- your product or services key features and benefits.

Marketing Plan:

Your marketing plan should define:

- **Marketing objectives:** Each objective of the marketing plan should be focused on enabling the organisation to deliver its mission and strategic aims.
- **Tools:**
 - **Price:** *how much will you need to charge for your product or service?*
 - **Place:** *which audience segment & routes to market will you focus on for delivery of this objective?*
 - **Promotion:** *your communications plan- which features and benefits will be communicated to this specific audience segment and through this specific route to market?*
- **Plan:**
 - **Goals:** *what goals will you need to meet to make sure you deliver the objective?*
 - **Time frame:** *when will you need to achieve these goals?*
 - **Resource/ budget:** *what will you need to invest in to achieve these goals?*

Relevant themes

- Social Model
- Business Model
- Marketing
- Organisation, Operations and Infrastructure

Part 6: Organisational Development

Part 6 of your business should provide an overview of the internal elements of the organisation. This should include the internal development goals, core capabilities and skill gaps, governance and legal structure.

Relevant themes

- Organisation, Operations and Infrastructure
- Legal Structures
- Governance

Part 7: Finance

Part 7 of your business should provide an overview of you current financial position and your future financial projections. This section should therefore include:

- **Summary of the organisations current financial position:** (For an existing organisations only)
 - Income statement (aka Profit and Loss Account)
 - Balance sheet
 - Cash-flow statement

- **Financial Projections:**
 - Income statement (aka Profit and Loss Account)
 - Balance sheet
 - Cash-flow statement
 - *You should also try and summarise the key assumptions from your financial projections.*

- **Funding requirement:** You should clearly define the funding/ investment requirement and why it is needed (start up funding, working capital, growth/ expansion etc).

Relevant themes

- Financial Management
- Funding and Finance

Appendices

You should aim to keep your business plan as concise as possible. If you are struggling to fit in some of the more detailed information in a concise manner, consider moving some information to the appendix. Remember- you should only include content which is relevant to/ supports the main body of the business plan. Any appendix content must be referenced directly in the main body of the business plan. The following list gives some examples of typical content that is often moved to the appendix of a business plan:

- Biog/ CVs of core management team/ board
- Detailed data from your environmental analysis (theory of the problem) e.g. consultation summaries, survey data etc.
- Detailed data from market research
- Detailed financial information (projection assumptions, full P&L etc)