CCVS Outline for a basic business plan

There is no set format for a business plan, but typically it would cover:

1. **Background to the charity & operating environment**
2. **Aims the charity will focus on during the lifetime of the plan**
3. **Financing the plan**
4. **Risks associated with the plan**
5. **Evaluating the performance of the plan**

1. Background to the charity & operating environment

1.2 Introduction

- **Name of your charity, legal status, how you began**
- **Your charitable objects** - as outlined in your governing document
- **Your Vision** - hopes and ambitions for the future

  For example - *We want a town where all older people have the opportunity to live fulfilled lives*
- **Your Mission**- outlines why you exist

  For example - *To find the expertise and resources to support the social inclusion of older people in our town*
- **Values -** act as guide as to how we will achieve our mission:

  For example:
  - *Client focused*
  - *Supportive of each other*
- **Outcomes**

  What changes do we need to happen to deliver our mission? Usual to develop 2-3 intended outcomes for example – *Older people in the community feel less lonely.*
- **Skills and experience of your people**
- **Strategy** this is the long-term plan (5 plus years) for the charity, if you have developed a strategy include a summary in your business plan. Guide to strategic planning

1.3 Why is your charity needed?

Outline evidence of need for your charity – numbers of eligible people, lack of existing provision, involvement and consultation of beneficiary group, letters of support – GP, community worker, market research. Why is your charity best placed to address this need.

Sources of statistics to demonstrate need:

- Office for National Statistics
- Census and labour market statistics
- District or ward profiles
- SCDC Services and Facilities Study
- Arts Council

1.4 Is your charity equipped to meet these needs?

You also need to think about the resources you have, how many people do you have to help, do you need to find more people? What skills do you need, what facilities do you have access to, what funds are you likely to be able to raise?

There are many planning tools available to help your organisation identify the additional resources that are needed. A SWOT analysis is one of the most straightforward tools and is intended to help you assess the strengths, weaknesses, opportunities and threats facing your organisation. A [PESTLE analysis] will help you review the wider context you operate within.

2. Aims the charity will focus on during the lifetime of the plan

(these should reflect your charitable objects)

2.1 What do we hope to achieve? Aims are broad statements of intent

For example -To improve access to existing opportunities and support the development of new opportunities for older people in our community identified as socially isolated by Mar 2026

2.2 Milestones a well-defined and significant steps toward achieving your aim

For example, there is a 25% increase in the number of older people engaging in community activities by Oct 2024

2.3 Objectives

How are we going to achieve these aims? Objectives should be SMART

For example, one objective might be - We will develop a community car scheme offering 20 lifts a week by Sept 2023

2.4 Identify Key Performance Indicators (KPI's) i.e., What needs to take place for the objectives to be achieved?

For example, of a KPI might be to recruit and onboard 8 volunteer drivers by August 2023

2.6 Outputs/activities

What are we actually going to do and how will we roll it out including timings.

3. Financing the plan

- Review potential income streams
- Create a budget for the lifetime of the plan
- Ensure rigorous financial controls are in place
- Larger groups or those with an ambitious programme of activities might also need to
- produce balance sheets and cash flow budgets

4. Risks associated with the plan

The activities outlined in the plan will have some sort of risk associated with them, but you need to do your best to identify risk and consider the likelihood of it occurring and impact the risk would have. Charity Commission guidance outlines how to assess the major areas of risk charities need to consider. Risks are not just to people's wellbeing they could also be risks to your organisation such as to your finances or your reputation.

Having key policies and procedures in place helps mitigate risk (contact us for support with these)

- Health & Safety including risk assessments
- Equality policy
- Safeguarding policy
- Financial policy
- Conflict of interest policy

5. Evaluating the performance of the plan

You will want to know that the activities you are running are achieving your goals so that you can adjust them if necessary or set new goals. You can do this by measuring the Key Performance Indicators you set alongside your objectives. You might also look for evidence that you have achieved your intended outcomes. For example, measuring any change in how lonely people feel after attending social activities over a period of time. There are lots of measurement tools available to help groups including TNLCF list of measurement tools

6. Useful additional links:

Resources to support writing a business plan:

- Cranfield Trust
- Business Planning guidance funded by Arts Council
- NLHF Business plan template and guidance
- NCVO business planning guidance
- NCVO setting objectives
- Risk table template