



# Dudley Council For Voluntary Service

## Factsheet 19A Business Planning Checklist

### What to include in a Business Plan

#### 1: Organisation Name

#### 2: Legal Status

Are you a registered charity, company limited by guarantee, unincorporated group or place of worship

#### 3: Organisation History

When the group was formed and a brief potted history

#### 4: Aims and Objectives

Take the aim from your group's constitution. Then include objectives of how you are going to achieve the group's aims.

#### 5: Key People

Include staff, management committee and volunteers. If possible carry out a skills audit of organisation requirements and existing skills of team. Include organisational structure. This will form basis of **Training and Development Plan**

#### 6: SWOT analysis

Strength Weakness Opportunity Threat

#### 7: Short Term Goals, Medium Term Goals, Long Term Goals

Remember to try to link organisational goals back to the Aims of the group. This will form the organisations 3 year plan

#### 8: Marketing

Include potential market size, competition, need and how to reach target audience

#### 9: Premises and Equipment

Where the service will run, what equipment is needed, current inventory

#### 10: Legal matters and Policies

As appropriate to the organisation, could include; insurance, liability, child protection, health and safety, equal opportunities, staff development, employment policies

### 11: Budgets and Cash flow forecasts

How the organisations money will be allocated over next 3 years. One year plan in more detail with next 2 years as forecasts. Include such items as

| INCOME                                | EXPENDITURE                   |                  |
|---------------------------------------|-------------------------------|------------------|
| Grants - for Capital<br>- for Revenue | <u>Revenue</u>                | <u>Capital</u>   |
| Subscriptions                         | Wages and National Insurance  | Office Equipment |
| Donations                             | Rent                          | Computer         |
| Equipment                             | Heat and Light                | Minibuses etc    |
| Sales of publications etc             | Postage, Printing, Stationery |                  |
| Fundraising event                     | Telephone                     |                  |
|                                       | Training                      |                  |
|                                       | Transport and Travel          |                  |
|                                       | Repairs and Renewals          |                  |
|                                       | Maintenance of Equipment      |                  |
|                                       | Cleaning                      |                  |

### 12: Work plan

For each objective develop a work plan to include key action, target date and allocate who will carry out the work

| Objective | Key Action | Due Date | Resources |
|-----------|------------|----------|-----------|
|-----------|------------|----------|-----------|

### 13: Further Help

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**[www.dudleycvs.org.uk](http://www.dudleycvs.org.uk)**