

**Factsheet** **4**

*Outline structure for three year business plan.*

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## 3-YEAR BUSINESS PLAN

[Insert name of your charity]

Produced by:

Date produced:

Planning period:

## **OVERVIEW**

The purpose of this brief section is to introduce the organisation to people who are not familiar with its activities, before going into more detail about its operations.

### **Background**

How it was set up, registered charity number and company number.

### **Mission**

Mission statement or brief statement of charity's purpose.

### **Aims and Objectives**

Main aims and objectives of the charity's work.

### **Charity Clients or Service Users**

Description of group supported by the charity.

### **Staff and Volunteers (or means by which service is provided)**

Description of how the charity provides its service to clients/groups supported.

### **Position**

How the charity fits in with the needs of the groups it supports, and relates to other organisations working in the same field.

### **Operations**

Description of the charity's activities, numbers of groups supported, how operations work, who delivers and manages services, how their success is measured.

### **Development**

Overview of how the charity has developed and is developing, any numbers showing growth of service and planned developments, or showing steady state of charity, or decline in operations – reasons for these.

### **Highlights: Previous Year**

Main successes of the year before the planning period.

### **Challenges for 3 or 5-year period ahead**

Main issues the charity is facing in the planning period.

## **STRATEGY**

This section should show the vision of the organisation and give an idea of how it is moving towards the vision.

### **Short Term**

Description – perhaps with examples of progress in past year and specific targets for coming year.

### **Medium Term Strategy**

More general – three year targets and strategic principles eg the way services will develop, any ideas of size of organisation over three years and likely changes due to operating environment (eg through changes in funding or changes in groups supported).

### **Long Term Strategy**

More general statement about the vision of the organisation and how it intends to develop over the next 5-10 years

May wish to include a section on the experience of the organisation or skills which will enable the organisation to achieve its strategic plans.

## **OPERATIONS**

Description of how operations have performed over last year and current state of organisation – and how they will be developed and managed over the next period. Practical examples of how operations are managed and will develop to enable strategic aims to be achieved.

Description of all activities carried out by charity, and how they will develop (detail for each service or type of service). You may wish to separate core activities and projects and describe their activities and the resources needed to manage them separately.

A list of key operational targets and a detailed Operations Plan can be attached in an Appendix.

## PEOPLE AND ORGANISATION

Description of all jobs/functions in the organisation – their roles and any information on how they will change. Show how their activities support operations.

- Patron
- President
- Vice Presidents and Board of Advisers
- Board of Trustees/Management Committee
- Staff

Describe the roles of the key staff members, their experience and how they are able to meet the needs of the organisation, any additional resources required. If particular staff are overstretched, describe the gaps they are having to fill and how these might be resourced.

- Volunteers  
Describe their roles and particular specialisms, need for training or support, recruitment and retention

### Job Responsibilities

Detailed job outlines for key personnel (Chief Executive, Heads of particular functions)

You may wish to include biographies of key personnel showing their experience and ability to meet the requirements of their roles – and any skill development/training that would help them.

### Organisation Development: Current/Forthcoming Year

How the organisation will change to meet its organisation needs – and how this will affect staff and other personnel. Any changes to the staff structure anticipated in the planning period.

### Training

Description of any training needed, why and what it will allow the person to achieve.

### Policies

Relating to personnel issues, e.g. equal opportunities policy.

## **MARKETING AND COMMUNICATIONS**

Description of marketing and communication activities with main stakeholder groups. These could include: Service Users, Community, Patron, President/Vice Presidents, Advisers, Trustees, Volunteers, Other Charities, Statutory Bodies, Funders, Donors, Other Supporters.

## **FUNDRAISING**

Description of main areas of fundraising activity, and fundraising strategy. These may include:

- Government/Local Government
- Trusts and Foundations
- Individual donors
- Corporate Supporters
- Participation in Events
- Donations in Kind

Outline of different types of funding, and plans for developing them from funding groups already described:

- Core Funding
- Non-core/Project Funding

## **FINANCE**

Description of the organisation's current finances, with any significant developments already known, and plans for managing financial affairs, including details of any financial systems, people involved in managing the financial area etc.

Detailed financial forecasts for the organisation as a whole, or for project finances, could be included in an Appendix, but any highlights, problems or cash flow problems should be mentioned in this section.

## Suggested appendices

Appendix A	<b>Operational Plans</b> Operations Calendar (3 years) Operations Plan in detail (1 year)
Appendix B	<b>Financial Information</b> Cashflow Forecasts: (1 year or 2 years) Income/Expenditure projections (3 years) Project Finance (for projects named in operations section)
Appendix C	<b>Staff Information</b> Biographies of key personnel
Appendix D	Structure Patron, President, Vice Presidents, Board of Advisers, Board of Trustees
Appendix E	<b>Activities</b> List of activities for the last year – examples of organisation’s work

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**If you are interested in learning more about how we could help your charity, please contact us:**



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