# Background

1. How long has the organization been in business? What is the legal status of the organization?
2. What is the staffing profile and structure of the organization (including unpaid staff)?
3. What need does the organization serve? Why is this important to the world right now?
4. Is the need for the organization growing or shrinking? (Do a bit of research!)
5. What kind of geographic boundaries does the organization have? What is your reach and what is the potential for your business in terms of numbers?
6. What is the profile of your most likely service users? Is it men, women, children? What are their ages? What do you know about this group of people? How does the organization address their needs?
7. What successes did the organization have last year?
8. What challenges do you anticipate next year that will need to be addressed?

# Vision

Your Vision Checklist:

* Does it excite you?
* Does it tell the world about the good you want to do?
* Is it bigger than you? (In other words, is it more than you can do alone?)
* Is it simple?
* Is it clear?
* Is it about what you can give? (not about what you’ll get)

# Mission

Your Mission checklist:

* Does it tell the world about the purpose of the organization?
* Is it clear and simple?
* Will it help keep you focused on the right things?
* Does it link in well with your Vision and tell people your part in delivering it?

# Values

|  |  |  |  |
| --- | --- | --- | --- |
| Values  | Key Importance | Impact | Good Effect |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Championing the Cause

This is the place to capture how best to communicate how you’ll help your service users and the role you’ll play in the community. Use the template below to structure this thinking and develop a plan to take your message into the world!

## MARKETING AND COMMUNICATION PLAN

| **Who you serve** | **Needs** | **Target Meet-Needs** | **Process to deliver message** | **Indicators** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Objectives and Priorities This Year

S – Specific

M – Measurable

A – Achievable

R – Realistic

T – Timebound

Your objectives and priorities checklist:

* Did you limit it to 3-5 things?
* Are your objectives SMART?
* Do they support your Vision and fit in with your Mission?
* Are you clear how your values will support you in delivering these things?
* Are your activities spread out across the year? Have you checked the timing of them against other commitments and known patterns in your business?
* Are all your activities in your Communication Plan accounted for?
* Does it feel exciting to see what you could accomplish in the next year?!

# People Development Plan

| **Gray Areas** | **Needs to be done** | **Timeframe** | **Cost and Expenses** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Operating Budget

## Estimated Operating Budget Worksheet

|  |  |  |
| --- | --- | --- |
|  | Estimated Amount  | Actual |
| Expected Income |  |  |
| GrantsDonationsFundraisingInterestOther incomeTOTAL: |  |  |
| Expected Expenditure |  |  |
| Staffing CostsOffice running costs (rent, etc.)SuppliesMileageStaff developmentMarketingOther costsTOTAL: |  |  |
| Programs/Project Costs |  |  |
| Program 1 (may relate to Objective 1)Development costsMarketing CostsRunning CostsStaffing CostsTOTAL:Program 2 (may relate to Objective 2)Development costsMarketing CostsRunning CostsStaffing CostsTOTAL: |  |  |
| TOTAL EXPENDITURE: |  |  |
| TOTAL Profit/Loss: (Income – Total Expenditure) |  |  |

# Risks and Opportunities

(This is called a SWOT Analysis.)

## SWOT Analysis

|  |  |
| --- | --- |
| **Strengths**  | **Weaknesses**  |
| **Opportunities**  | **Threats**  |

## Risk Register

|  |  |  |
| --- | --- | --- |
| **Risks Identified** | **Controls in place**  | **Who is responsible** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Success Measures

* 10 trainees enrolled each month between August and December.
* Good feedback from trainees on how useful the class was in helping them prepare for an interview.
* Number of trainees who get a job by 1 Jan 2013.

|  |  |
| --- | --- |
| **Measures of Success:** | **When this will be measured:****(Try to have measures throughout the year)** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Management Plan

GUIDANCE: Capture how often you’ll review this Plan and how decisions about priorities and changes will be made. It is essential that you don’t do all this great work and the let it gather dust on a shelf somewhere. Your Plan will be “LIVE” and will need to reviewed and updated at least every quarter by your Board and your Executive Management Team.

# The Action Plan

|  |
| --- |
| **Quarter 1 (Dates: )** |
| **Action to take** | **Related Objective** |  | **Start Date** | **End Date** | **Resources**Cost, time, people |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

|  |
| --- |
| **Quarter 2 (Dates: )** |
| **Action to take** | **Related Objective** |  | **Start Date** | **End Date** | **Resources**Cost, time, people |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

|  |
| --- |
| **Quarter 3 (Dates: )** |
| **Action to take** | **Related Objective** |  | **Start Date** | **End Date** | **Resources**Cost, time, people |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

|  |
| --- |
| **Quarter 4 (Dates: )** |
| **Action to take** | **Related Objective** |  | **Start Date** | **End Date** | **Resources**Cost, time, people |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |