



Business Planning Tools for
Extended Services for Schools

Business Development Planner

Organisation

Project

	First	Last
Contact	<input type="text"/>	<input type="text"/>
Telephone	<input type="text"/>	
Position	<input type="text"/>	
Address 1	<input type="text"/>	
Address 2	<input type="text"/>	
Town/City	<input type="text"/>	

Read This! - About Your Plan

Click for Guidance

This spreadsheet will help you complete a Business Development Plan that will prepare you for setting up a sustainable project with realistic aims and objectives.

It is intended to be used in conjunction with the Softlines Financial Planner (this is a separate Excel spreadsheet).

Your Business Development Plan is much more than the answers you give to the questions in the spaces provided on the following worksheets. The Guidance Notes for each, which can be accessed via buttons like the one shown above, describe the things you need to do and understand in order to complete your Business Development Plan.

Some pages will also have a 'Read First' button.

This will open up a window with contextual guidance and other ideas for consideration.

Make sure you read the contents of these windows!

Read First!

The spaces on the following worksheets should contain a **summary** of your findings and evidence of the work you have done.

When you have completed the work/research outlined in this Business Development Plan you will be in a good position to work on your **Financial Plan**.

Stage 1 - What's the Big Idea?

A. check out your idea for a project

Stage 2 - Plan For Success

A. read all the Guidance Notes - use 'Click for Guidance' buttons, as above.

B. carry out all the recommended research, collect all the required evidence.

C. fill in the text boxes in each worksheet

Stage 3 - Plan Your Finances

A. complete the Softlines Financial Planner

Enclosures

You can indicate what additional information you are adding to your Plan by ticking the boxes you will find within the spreadsheet. This will generate an enclosure list (see 'Enclosures' page) that will remind you to what should accompany your Plan.

Log

Please keep a log of events relating to this Plan on the 'Log' worksheet. This will help you to keep track of progress, and help the process when you submit your Plan for approval or examination.

What's the Big Idea?

[Click for Guidance](#)

- ♦ What is your big idea? Write a brief description of what your project will do.
- ♦ Is there any need for your project?
- ♦ Who have you approached with your idea?

[Read First!](#)

Setup

[Click for Guidance](#)

- ◆ Who is going to run your project? (Click for Guidance)
- ◆ What is their legal status? Who will be responsible for finance and management?
- ◆ How will the project be managed and monitored?

[Read First!](#)

Operation

[Click for Guidance](#)

[Read First!](#)

- ♦ What will the project offer its beneficiaries (a brief description)?
- ♦ What are the tasks needed to start and run the project?
Outline timing and timescales for these tasks.
- ♦ How do you intend to make sure that the beneficiaries have access to a service that matches best practice? Refer to activity plans, equipment and materials, which you should include as appendices, as well as a sketch map of the premises. In consultation!!!

Enclosed: Sample activity plans Lists of materials, activities and equipment
 Sample fee structures

SWOT analysis

[Click for Guidance](#)

- ♦ What are the **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats facing your project?

Strengths

Weaknesses

Opportunities

Threats

Market Research

[Click for Guidance](#)

- ♦ What is the anticipated level of demand for the service you intend to provide?
- ♦ What evidence do you have of the need for your project?
- ♦ Are similar services being provided in your locality?

[Read First!](#)

Enclosed: Evidence of need for the project

Consultation

[Click for Guidance](#)

- ♦ Who have you approached with your project proposal?
 - ♦ How have you made contact and obtained your evidence? e.g. letter, survey, telephone?
 - ♦ How do these groups feel about your project proposal? What level of support do they have for it?
- Make reference to any independent evidence (e.g. letters of support, newspaper articles).

Enclosed: Evidence of consultation with:

- | | |
|---|---|
| <input type="checkbox"/> Potential Beneficiaries | <input type="checkbox"/> Other providers |
| <input type="checkbox"/> Parents | <input type="checkbox"/> Relevant agencies |

Fees and Charges

[Click for Guidance](#)

- ◆ Who will be your users? What can they afford to pay?
- ◆ What other similar facilities exist? What are they charging?
- ◆ How does your fee structure compare? Is it competitive?

Quality

- ◆ How will you make sure your project is of good quality?

Enclosed: Plans for ensuring a good quality service

Monitoring and Evaluation

- ◆ How will you monitor and evaluate your project?

Enclosed: Plans for monitoring and evaluation

Equal Opportunities and Additional Needs

- ◆ How will your project encourage equal opportunities?
- ◆ What will you do to make sure that your project meets the needs of beneficiaries with additional needs (such as learning difficulties or physical mobility) as well as those from other cultures or ethnic backgrounds?

Enclosed: Your Equal opportunity statement and policy

Enclosed: Plans to meet additional needs

Legal requirements -

Read First!

Will your premises meet the legal requirements for your project - including fire safety and environmental health? If not, describe what you have to do to meet the standards and the costs involved.

Enclosed: Details of costs of meeting legal requirements

A location sketch map

Running Costs -

What are the leasing arrangements for the premises and the basis for your rent? Do you have any other premises costs such as rates, heating, start-up costs and so on?

Enclosed: Details of premises costs

Equipment

[Click for Guidance](#)

- ◆ Providing the service involves buying equipment for users and for the administration of the project. What sort of costs do you think you may have?
- ◆ How you are going to finance equipment (loans, cash purchases, hire agreements, leases and so on)? Include payback or contract timescales if these are relevant.

Enclosed: Details of equipment and/or finance arrangements

◆ Do you need to provide transport for this project? What would be the costs involved?

[Read First!](#)

Enclosed: Details of transport costs

Campaign - Where and when will you promote your project? What are your target groups?

Enclosed: An outline promotional campaign

Methods - What methods will you use to promote your project, for example posters, adverts, etc?

Enclosed: Samples of your proposed publicity material

Staff Operation -

Read First!

What are the hours worked; which weeks in the year?

What will be the cost of: recruitment; holiday and sickness cover; the use of volunteers?

Enclosed: Job descriptions and terms and conditions

Skills Audit -

How many staff? What qualifications, skills and experience should they have?

Enclosed: Person specifications

- ♦ What financial and accounting systems will you use to control payments, receipts, cashflow and other finances such as debtors and creditors?
- ♦ How will you monitor your cashflows and measure profit or loss?

[Read First!](#)

Enclosed: Details of financial controls

- ◆ How you will maintain your Project?
- ◆ What are your fund-raising plans, and anticipated financial or in-kind support?
- ◆ What back-up plans do you have in case these plans are not successful?
- ◆ What plans do you have for the long-term sustainability of the project?

Read First!

Enclosed: Plans for fundraising

