CREATING THE BUSINESS PLAN
For Organizations
General Layout

- Title Page
- Executive Summary
- Organization Description
- Operational Plan
- Program Details
- Management and Organization
- Financial Plan
- Appendix
Title Page

- This is like the title page of a resume
- Should include:
  - Logo
  - Business Plan – Just under the organization’s name should be the words “business plan” to show exactly what the document is
  - The Date the plan was finalized
  - Contact Information
Executive Summary

- Should be written last
- One page summary of organization
- Includes Mission and Vision Statements
  - Mission Statement - “A written declaration of an organization’s core purpose and focus that normally remains unchanged over time. Properly crafted mission statements (1) serve as filters to separate what is important from what is not, (2) clearly state which markets will be served and how, and (3) communicate a sense of intended direction to the entire organization”
  - Vision Statement - “An aspirational description of what an organization would like to achieve or accomplish in the mid-term or long-term future. It is intended to serve as a clear guide for choosing current and future course of action”
- Concise description of organization
Mission Statement - Examples

- **Make-A-Wish**: We grant the wishes of children with life-threatening medical conditions to enrich the human experience with hope, strength and joy.

- **San Diego Zoo** is a conservation, education, and recreation organization dedicated to the reproduction, protection, and exhibition of animals, plants, and their habitats.

- **NPR**: To work in partnership with member stations to create a more informed public – one challenged and invigorated by a deeper understanding and appreciation of events, ideas and cultures.
Vision Statement - Examples

- **Make-A-Wish**: We are dedicated to making every eligible child’s wish come true.

- **San Diego Zoo**: To become a world leader at connecting people to wildlife and conservation.

- **NPR**, with its network of independent member stations, is America’s pre-eminent news institution.
Organization Description

- Detailed description of organization at the national and local levels
- Highlight achievements, accomplishments, and awards
- Show real examples of how challenges were met or goals were exceeded
- Highlight what you hope to accomplish
- Outline any goals you may have
Operational Plan

- How is your organization going to be run?
- Including, but not limited to:
  - Meetings
  - Memberships
  - Official Document Procedures
  - Committees
Program Details

- Programs that your organization will be involved in
- Can include, but not limited to:
  - *Professional Development*
    - Workshops, Seminars, Conferences
  - *Fundraising*
  - *Community Service*
  - *Marketing*
- Timelines and detailed information as a point of reference
Management

- Hierarchical information of organization management:
  - President
  - Vice President
  - Secretary
  - Treasurer
  - Professional Development Director

- Can include missing positions and your plans to fill them

- Can include Professional Contact Directory
Financial Plan

- How will your organization remain fiscally responsible?
- List where your finances are today as well as a 1-to-2 year projection
- Budget
  - *Done annually at the beginning of each fiscal year*
- Use this space for charts, graphs, or other visual material
- Plans for raising funds
- Plans for use of funds
Appendix

- Miscellaneous supporting documents
- Only include what is most relevant
- Can include, but is not limited to:
  - Financial statements
  - Endorsements
  - Agreements