

## Full Guide:

# Developing a plan

## A guide for a voluntary or community group

Having a plan for managing and developing the work and activities you want to carry out is important if you are to have a clear direction and are to be in control of what you do. Your plan will state what you aim to do for the short and medium term, usually covering the next three to five years. It will also contain your mission and vision, an assessment of the environment in which your services operate including who your stakeholders are and what risks are out there. Having a plan helps you to focus and avoid "strategic" or "mission" drift which is often caused by chasing funders' criteria rather than staying true to your own vision.

There are three types of plan a voluntary and community organisation or social enterprise may wish to write:

- Strategic plan
- Business plan
- Project plan(s)

For some organisations, it will be necessary to write all three. For others, you may wish to concentrate only on one type of plan (at least to start with). If you are thinking about approaching funders for a new project, or you are at a point when your organisation is facing change, then going through the process of writing your plan(s) will be particularly helpful.

## A Strategic Plan

A strategic plan concentrates on the big picture. It follows directly from your mission statement. It looks over a long term period (often around 5 years). It maps out the key aims of an organisation and shows the overall direction the organisation wishes to take.

When making decisions about projects, contracts or funding, your Strategic Plan is the blueprint that helps you make shorter term decisions and keeps you focused on your overall aims.

For support with writing a Strategic Plan see:

- [www.knowhownonprofit.org/organisation/strategy/plan](http://www.knowhownonprofit.org/organisation/strategy/plan) - links to a template plan, and lots of other useful information
- [www.diycommitteeguide.org/article/what-strategic-planning](http://www.diycommitteeguide.org/article/what-strategic-planning) - great webpage, with lots of links and tools to help you develop your strategic plan.
- [www.compasspartnership.co.uk/pdf/egsp.pdf](http://www.compasspartnership.co.uk/pdf/egsp.pdf) - ACEVO (Association of Chief Executives of Voluntary Organisations) Essential Guide to Strategic Planning

## A Business Plan

A business plan helps you put on paper how you will turn your vision (or strategic plan) into reality. It normally deals with a timescale of around 3 years (with more detailed planning for year 1). It should be a working document, written in plain English and understandable by all those likely to read it (staff, volunteers, Trustees, funders....).

Good rules for business planning are:

- Don't do it on your own.... Involve your clients, staff, trustees, volunteers and other stakeholders
- Keep it clear and concise. Think maximum impact, minimum fluff
- Excite the reader – give them something to believe in
- Show your passion for your organisation and what it does
- Know your market – your competitors and where you fit in
- Get the figures right – keep it realistic and based on experience of similar projects but make sure you cover all your overheads and real costs (full cost recovery)
- Risk – show you've thought about risk and how you will reduce any risks

[Adapted from Peter Jones' website – [www.peterjones.com](http://www.peterjones.com)]

A good business plan provides a summary of:

- What your organisation is about
- What it wants to achieve
- How it plans to do this
- Who will benefit from the work
- Evidence that the work is needed
- What resources are needed to do the work
- Who will be involved in delivering and managing the work (including their skills)
- Where the money/resources will come from
- When you will carry out the work
- How you will know you've been successful

[Adapted from the Luton & Dunstable Partnership toolkit]

For guidance on developing your business plan see these excellent resources:

- [www.voluntaryworks.org.uk/.../documents/BusinessPlanningToolKit.pdf](http://www.voluntaryworks.org.uk/.../documents/BusinessPlanningToolKit.pdf) - great step by step business planning toolkit
- [www.forthsectordevelopment.org.uk/documents/New\\_BusPlanGuide.pdf](http://www.forthsectordevelopment.org.uk/documents/New_BusPlanGuide.pdf) - great Business planning document, for social enterprise, but worth a look by any organisation (easy to read, with great cartoons...)
- [http://www.princes-trust.org.uk/need\\_help/enterprise\\_programme/explore\\_where\\_to\\_start/business\\_plans/business\\_plan\\_templates.aspx](http://www.princes-trust.org.uk/need_help/enterprise_programme/explore_where_to_start/business_plans/business_plan_templates.aspx) - Written for for-profit business, but aimed at young people, so the resources are clear & easy to understand. Includes templates.

## A Project Plan

A project plan(s) may form part of your business plan. A project plan is a detailed plan, concentrating on a specific project or area of work. It will contain very detailed planning for a year (though can cover a period of up to 3 years). A project plan will cover:

- What you want to do (overall aim)
- Why you want to do it (evidence of need)
- How you will do it (the detail of what you will do – eg number of training sessions, number of 1:1 clients you will support)
- Who you will work (clients/project users, but also remember other organisations or partners you will work with)
- What the result will be (what is going to change for your clients/users?)
- How much it will cost (remember to include overhead costs. Be realistic)

- What you will do at the end of the project (your exit strategy – how will you make sure people are supported going forward, or how will you get further funding)
- How you will keep track of your progress (what records will you keep of what you're doing and the difference it's making?)

For more information on project planning see:

- <http://www.biglotteryfund.org.uk/funding/funding-guidance/applying-for-funding> - lots of resources to help with writing particular elements of your project plan.
- [www.biglotteryfund.org.uk/pub\\_business\\_plan\\_guide.pdf](http://www.biglotteryfund.org.uk/pub_business_plan_guide.pdf) - Big Lottery business plan Guide
- <http://knowhownonprofit.org/people/your-development/professional/projectman>

For further information on all aspects of planning see:

- <http://business-survival-toolkit.co.uk/> - lots of tools to help you think about your organisation and where you want to be (covers long term and short term planning). Aimed at cultural/heritage organisations but the tools could be used by any organisation

**For more information or support in developing a plan, or to have a look at the full range of information sheets available from Devon Voluntary Action (DeVA) visit [http://www.devonva.org/information\\_and\\_guidance](http://www.devonva.org/information_and_guidance) or contact DeVA on 0845 6099901 or by emailing [support@devonva.org](mailto:support@devonva.org).**

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