

Business Plan Template

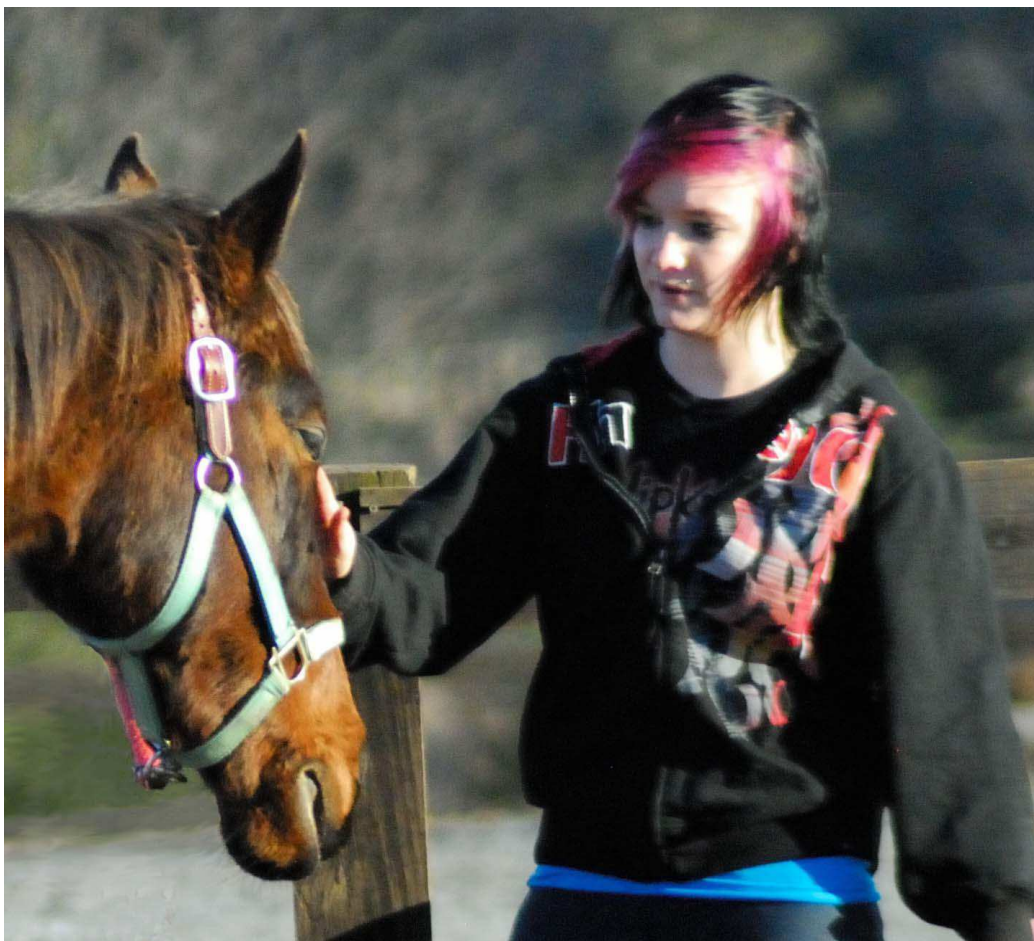
Dear Path Colleagues,

We all want to be fully funded. On the next 10 pages is a tutorial on how to make a business plan. I have used this with my college students, and have had great success. Please do not look at this as a daunting task – it can be fun and educational, and best of all, it will lead to your organization’s success. I welcome you to email me with any questions, and will be glad to help walk you through the process!

Good Luck, and have fun with this!

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Non-Profit name. (Business name if not non-profit)



Front Page

Your Logo: Be sure that this is a good representation of your mission

You can put a picture that represents your organization here as well!

Mission (Statement of Purpose if not non-profit)

State your mission:

- What are you doing?
- Why are you doing it?
- Make it powerful in a few words!

EXAMPLE: Brook Hill Farm, a non-profit horse rescue organization, exists to provide rehabilitation focused services and safe haven for unwanted horses, as well as offers equine assisted activities for personal growth and equine education for the community.

What: Horse Rescue and Rehabilitation, Equine Assisted Activities, Equine education

Why: Unwanted horses needing a safe haven, equine assisted activities needed for personal growth, community needing equine education

Organizations you belong

What organizations are you affiliated with?

EXAMPLES:

1. Global Federation of Animal Sanctuaries – Fully Accredited
2. ASPCA
3. Guide Star
4. PATH International

Program Titles:

List all of your programs here!

EXAMPLE:

1. Community Equine Education
2. Therapeutic Riding
3. Horse Rescue

**Be creative – have fun with this
Should not just be boring text!!!**

Values

List what you believe, what are your values?

EXAMPLE:

1. (Your organization) does not discriminate on the basis of race, color, national origin, sex, religion, age, disability, political beliefs, sexual orientation, marital, or family status.
2. (Your organization) exists to carry out and inspire the love, care and responsible stewardship of horses in and by young people, staff, volunteers and foster homes.
3. What do you stand for, and what do you want the public and your volunteers to abide by?

Programs

The Programs you run:

What do you offer – these are the things that will bring a steady stream of cash flow – this is money you can count on each month to make your expenses!

EXAMPLE:

1. Horse Rescue – explanation of what you do
2. Therapeutic Riding – explanation of what you do

Present

This is where you give numbers and data, explaining what you do!

What are you doing now?

1. How many students?
2. How many volunteers?
3. How many Visitors?
4. Etc.

Recognition

- 1) Newspaper articles and dates
- 2) TV coverage
- 3) Awards you have received (Global Federation Accreditation etc.)
- 4) Etc.

Euthanasia Policy

What is your view? You may be a no kill shelter, but if an animal is suffering, what is your policy?

Strategic Vision

How do you want to grow – students, facility, etc.? Let them know major things you need – Where do you see the organization in 5 years? This is the place to share your vision – your dream!

Brook Hill Farm: SWOTs

Internal – in your organization	External – things from outside your organization
<p><u>Strengths:</u></p> <ul style="list-style-type: none">• Example: Clear Mission• Example: Experienced Leadership• Example: Defined proven programs• Etc. _____	<p><u>Opportunities:</u></p> <ul style="list-style-type: none">• Example: Horse need• Example: Therapeutic need• Etc. _____
<p><u>Weaknesses:</u></p> <ul style="list-style-type: none">• Example: Low pay for staff• Example: Size and capacity of facility• Etc. _____	<p><u>Threats:</u></p> <ul style="list-style-type: none">• Example: Economy• Example: No Endowment• Etc. _____

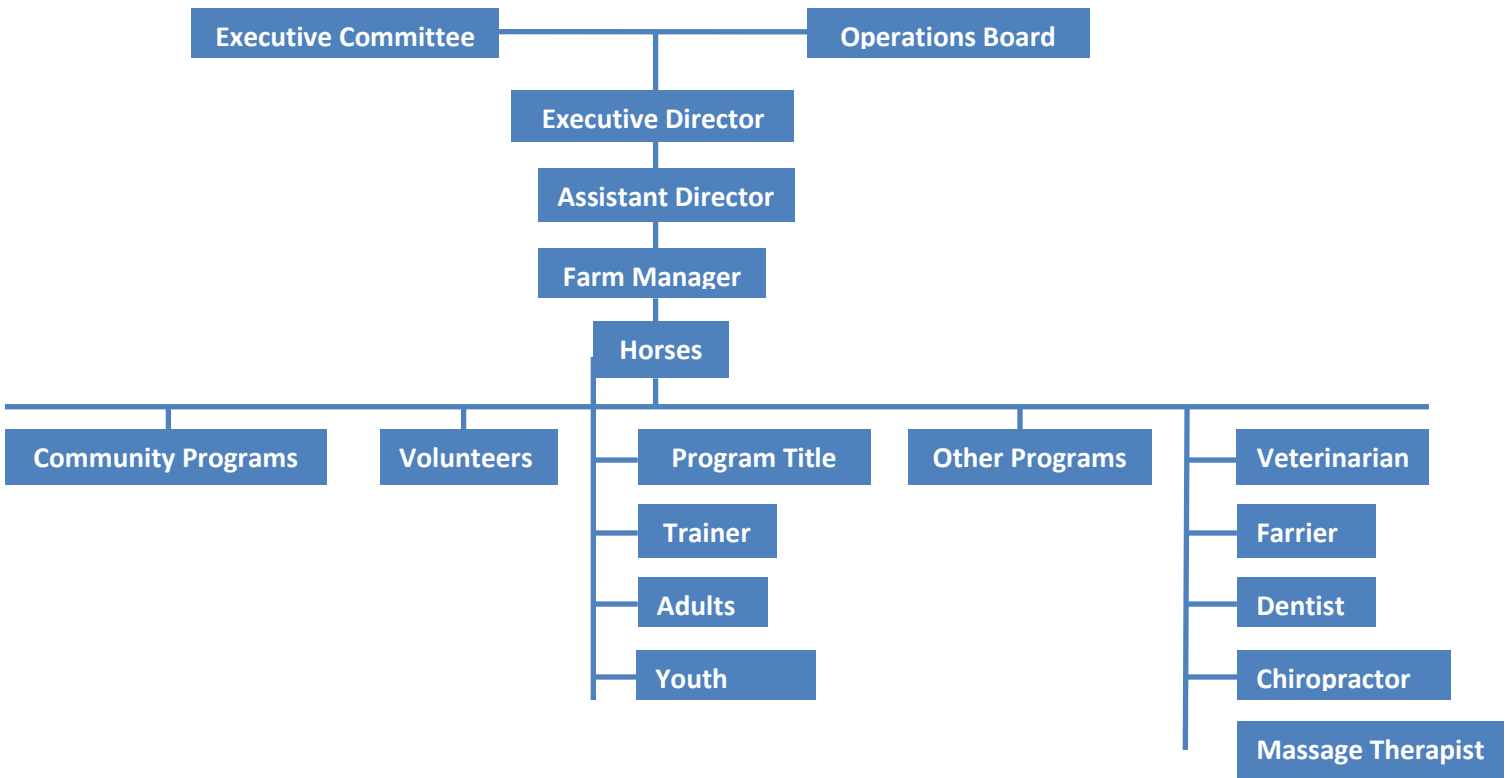
Economic Impact

Does your organization have an economic impact in your community? Does your spending contribute to jobs in the community?

Graphs

Use Graphs to show your donors at a glance what you have done – horses saved, volunteers, etc.

Organization, Structure, and Responsibilities – Who reports to who?



Board of Directors (omit if for profit business)

Mission: What is their mission? To help you with finances, find volunteers, etc.?

Responsibility: What do they need to do? Provide personal expertise, time and effort?

Member Profile: Example: A Chairman of the Board elected by the board, Executive Director, Assistant Executive Director and Secretary, and select volunteers who individually and as a team are committed to provide expertise, time and effort required to fulfill the mission of the organization.

Structure: Example: Executive team and at least 9 outside directors.

Include a list of your members and their contact information!

Executive Director (Or job title if a for profit) – Basically if you had to hire someone... their Job description!

Mission: Example: To provide operational leadership, expertise, and knowledge required to sustain its mission

Responsibilities: Example:

1. Management and General

Hiring, Firing and oversight of staff and volunteers in charge of all internal operations of the agency such as financial controls, accounting, adherence to legal requirements and reports, payroll, staff supervision, strategic planning, technology development , and risk management.

2. Volunteer Management

Oversight of staff and volunteers, responsible for the implementation of all volunteer recruitment, recognition, training, and dismissal procedures which will utilize the skills and expertise of volunteers in the most effective manner possible for all aspects of the non-profit.

3. Program Management

Oversight of staff and volunteers responsible for the development and implementation of all programs approved by the board

4. Community Involvement

Oversight of volunteer or staff responsible for all aspects of community involvement and community collaboration

5. Marketing

Oversight of staff or volunteers responsible for the development and implementation of a year round marketing plan, publicity campaigns and all aspects of building brand identity and positive public relations

6. Resource Development

Oversight of volunteers or staff involved in all aspects of resource development of fundraising: to include grants and foundations, donor base, pledges, sponsorships, and the establishment of an endowment.

Profile: Who are you hiring, and what experience do you want them to have? (The resume!)

Other Employees:

Who else is on the payroll, and what do they do?

Graphs

Again, you can use a graph to open this next section – show a pie graph of where your donations come from – individuals, businesses, grants and foundations, etc.

Business Plan Template

Financials (A for profit would list income sources instead of donations)

Fill in this chart – this is the actual money you have made!

You can add columns as needed according to your organization!

	Starting Year	Year 2000?	Year 2000?	Year 2000?	Year 2000?	Year 2000?
DONATION INCOME						
Individuals						
Businesses						
Grants/Foundations						
Major Donors						
TOTAL DONATION INCOME						
OTHER REVENUE						
Program Fees						
Scholarships						
Events						
Capital Campaign						
TOTAL OTHER REVENUE						
Total Income						
EXPENSES						
Program Services						
Salary						
Capital Project						
Endowment						
Total Expenses						
Profit/Loss						

Business Plan Template

Projected Financials – (for profits list your income sources) where are you going? Your long range budget!

Be realistic – many organizations think they can do more than they can!

Most organizations only increase their income by 10% each year!

	Actual 2012	Projected 2013	Projected 2014	Projected 2015	Projected 2016	Projected 2017
DONATION INCOME						
Individuals						
Businesses						
Grants/Foundations						
Major Donors						
TOTAL DONATION INCOME						
OTHER REVENUE						
Program Fees						
Scholarships						
Events						
Capital Campaign						
TOTAL OTHER REVENUE						
Total Income						
EXPENSES						
Program Services						
Salary						
Capital Project						
Endowment						
Total Expenses						
Profit/Loss						

Business Plan Template

Strategic Action Plan for 2013 – How will you get there? Again, a for profit company uses income sources, how do you get income?

Operating Expenses	Actual 200? Cash	Projected 200? Cash	Strategic Action Plan
Individuals			Expand Mailing list Expand Data Base of emails Monthly Newsletter
Businesses			Apply to Area Businesses for funding
Grants/Foundations			Apply to Grants from last year Continue fostering Foundation relations
Major Donors			Major Donor Development
Program Fees			Increase Group Visits by 10
Internships			Increase Internships to 3
Events			Participate in an 2 Events
Capital Campaign			Apply to 5 new foundations/ grants
Total Income			

Implementation – 5 Year Plan

Year	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	No v	Dec
2013	Example: Continue Major Fundraising for Capital Project Example: Continue Construction											
2014	Fill in rest of chart.....											
2015												
2016												
2017												

Conclusion

Retell your story – your mission, your vision, your strategic action plan – summarize the information above in a one paragraph narrative – this needs to be powerful! Your elevator speech! (Speech that lasts less than 90 seconds and tells about your program)

Contact Information:

Legal name and status of business:	
Contacts:	
Address of main office:	
Main telephone:	
E-mail	
Website	
Business incorporation/registration date:	
Business incorporation/registration number:	
Employer Identification Number	
Accountant	
Insurance	
Legal Counsel	
Financial Consultant	

Succession Plan:

So many businesses leave out this important step!

What happens if you leave?

These are the steps they will follow so organization continues!

In the case that the non-profit dissolves, what happens?

How are you planning for this financially?

EXAMPLE:

If the non-profit dissolves, all proceeds due the non-profit, including monetary, horses, and removable items would be transferred to another non-profit organization approved by the Executive Board of Directors.