



Sustainable Funding Cyllid Cynaliadwy Cymru

Outline for a business plan

1. **A cover** - Include your name and logo, details of the funder, and the date. Number different drafts sequentially to keep track.
2. **Executive summary**
A brief description of the project or development; the total funding required, prospective sources, and a statement of the amount being applied for from this funder.
3. **Background**
What you do, your objectives (and charitable objects), the origins and development of your organisation, your constitutional arrangements.
4. **Personnel**
List the names of the current trustees and the manager with their roles and experience (include key staff job descriptions in an appendix).
5. **Evidence of need or “market”**
Provide details of the current and proposed users of your service, how you have identified and evaluated the need (with objective quantified information on this need and with anecdotal evidence), and the “competition” *i.e.* anyone else offering similar services (describe any feasibility study work or market research you have carried out, but present the full results in an appendix).
6. **The development proposal**
The services which you want to provide or develop, who and where your users will be, any special regulations you will have to meet, and potential problems which you have evaluated.
7. **Marketing and promotion**
How potential users and purchasers will hear about your service.
8. **Charges**
Describe how have you fixed your charges, if any, and how do they compare with similar services elsewhere (include any detailed calculations in an appendix).

- 9. Staffing and volunteering**
Describe paid posts and volunteer involvement, skills required, recruitment issues, induction and training. Any skills shortages or gaps in the team should be identified together with action to recruit or train.
- 10. Management**
Who makes overall policy and who takes day to day decisions, and existing and proposed line management and communication arrangements; procedures for target setting, management reporting, monitoring, staff supervision, and appraisals, management of financial arrangements (a organisation chart may help).
- 11. Premises, equipment and other issues**
The ownership and/or tenancy terms, lease or purchase cost, and suitability of premises, adaptations and conversion costs, transport facilities etc.
- 12. Training and support**
The help you have had and will continue to receive to develop the project, the capacity of your group, and management skills, training plans.
- 13. The beneficiaries**
The groups of people who receive benefit from your activities, (e.g. service users and clients, volunteers), how they benefit and how you will you record and measure whether you are achieving these benefits.
- 14. Accountability**
How you will evaluate your progress and achievements; how you will communicate with and involve and the community, users, partners, funders etc.
- 15. Budget/cash flow forecast**
For the forthcoming three years.
- 16. Analysis of the financial arrangements**
A detailed description and overall assessment of the financial implications of your proposals, explaining each item which appears under the income and expenditure headings in your cash flow forecast; sources of funding and prospects for sustainability.
- 17. Project timetable**
A timetable showing the key stages in achieving each of your main objectives
- 18. Strengths and weaknesses**
A description of the strengths and weaknesses of your organisation and project and how you will deal with the weaknesses.
- 19. Summary of grant request**
The total amount of grant aid needed from all sources, the sources explored and funding secured, particularly matching funding, sustainability, future funding needs and possible sources.



Cefnogwyd gan

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