Simple Business Plan Template for

Community Groups

[Enter Name of Group]

[Enter Address]

[Enter period covered by the Business Plan – no more than 3 years]

[Place Logo]

Note: In order to work with or seek the help of the local authority some councils ask small community groups for a “business plan”. This simple 4-page plan covers the essentials.

**1. Our organisation’s history and background.**

Write a brief summary of how your organisation began, how it has developed and where it is today. If you are affiliated to a national body then note it here.

**2. Governance**

Explain how you manage your group, e.g.

The group has a Management Committee of 7 elected members. Currently these are:

* Annie Kilcanny, Chair
* Peter Pound, Treasurer
* Amelia Rocco, Secretary
* Matthew Botton
* etc

Committee Members are elected by the membership on a rolling 3-year basis at the group’s Annual General Meeting in [MONTH]. On election to Committee, Members agree to work in the best interests of the group in accordance with our *Constitution* dated [DATE]. All new Committee Members receive an induction.

The group recognises the importance of good governance and Committee Members are encouraged to undertake relevant training. This may by training for the whole Committee on aspects of managing the group, or it may be specific training, e.g. Excel book-keeping for a newly appointed Treasurer. A record is kept of all training.

The group adheres to best practice in the management of its accounts, requiring two signatures for the authorisation of payments. The annual accounts are independently examined.

The Committee are aware of their duty of care to Members, beneficiaries and visitors and regularly review the group’s policies and practices relating to health and safety, risk and equality. The Committee will seek professional advice when required.

Committee Meetings are held [Number] of times a year and are minuted.

**3. Future Activities**

What do you plan to do over the next three years? Perhaps you want to increase your membership or the number of visitors or beneficiaries? Do you have plans to find new premises? Do you want more people to find out about your group? Often you may just want to “maintain our role in the local community” but think about what could derail your plans: rising costs, falling membership, etc.

Highlight key points, e.g.

* By the end of Year 1 we will have attracted 10 new members. This influx of new people will bring new ideas into the group and will potentially increase our income to help meet any unexpected costs such as an increase in room hire, insurance, etc.

**4. Timeline**

Most community groups do more or less the same thing year in, year out. For Year 1 add some detail about your activities, e.g. meetings, visits, social events, competitions, etc. Years 2 and 3 can be less detailed. The following examples may give you some ideas:

|  |  |  |
| --- | --- | --- |
| Planned Activity | How we are going to achieve this | When we are going to achieve this |
| Increase membership by 10 new members. | Promoting our activities through local media.Offer 1st year’s membership at 50% discount. | End Year 1 |
| Increase income  | By holding an annual raffle. | July Year 1 |
| Increase income  | By holding a Member +1 Dinner as our main annual fundraising event. | Sept Year 1 |
| Increase income  | By attracting new members in Year 1. | End Year 2 |
|  |  | etc. |

**5. Funding**

Use last year’s accounts to cost your activities, e.g.

|  |
| --- |
| Year 1 |
| Item | Cost | Income | Source |
| Rent / room hire | £500 | £500 | Membership dues |
| Public Liability Insurance | £75 | £75 | Membership dues |
| Visit to National Trust property | £250 | £200£50 | Funder donationMembership dues |
| Annual Fundraising Event | £450 | £250£200 | Fundraising ticket salesRaffle |
|  |  |  | etc. |

**6. Risks**

What risks might you face over the period of the business plan? How will you mitigate the risks?

|  |  |
| --- | --- |
| Risk | Mitigation |
| Membership drive fails to meet target. | Do not rely on new income in Year 1. Put income from new members into reserves for use at a later date. |
| Annual Fundraiser - Ticket sales poor. | Give members option to organise another fundraising day or cancel event. Put any surplus money raised from raffle into reserves. |
| Unexpected rise in rent / room hire | * Ask landlord to defer increase until following year so membership dues can be adjusted.
* Raise membership dues.
* Use money from reserves.
* Consider alternative premises.
 |
|  | etc |

**7. Tracking our progress**

Briefly describe how you make sure you are on track to achieve your outcomes, e.g.

|  |  |
| --- | --- |
| Milestone | Date |
| Recruit 7 new members | End August Year 1 |
| Recruit 3 new members | End Year 1 |
| Raise funds at Annual Fundraising Event(s) | End September Year 1 |
|  | etc. |

**8. Release Date**

This document was released on [DATE].

Signed:……………………………….(Chair)

Name:……………………………………….