

Business Plan Outline

Social Entrepreneurship for the Tax Exempt Organization

1. Executive Summary

- 1.1 Mission statement
- 1.2 Vision statement
- 1.3 Organization – operations and management
- 1.4 Entrepreneurial opportunity – strategic goals
- 1.5 Product or service summary – Market Opportunity
- 1.6 Value Proposition – Financial, Goodwill, Mission related
- 1.7 Financial Summary – Anticipated Revenue

2. Description of the Organization

- 2.1 Mission
- 2.2 Target constituency/ies (*see* Market below)
- 2.3 Operational/Business Model – revenue derivation & allocation
- 2.4 Earned income/Social Enterprise Opportunity – the Idea
- 2.5 Value Proposition
- 2.6 Organizational capacity to manage EI proposition – management, staff, Board, other key stakeholders

3. Market Opportunity/Trends

- 3.1 Market Description & Analysis
- 3.2 Current Market Trends & Characteristics
- 3.3 EI Opportunity
- 3.4 Customer/Constituency Base
- 3.5 Competitive Advantage -- Competition

4. Product/Service/Marketing Development

- 4.1 Concept and Enterprise
- 4.2 Enterprise Elements & Development Timeline
- 4.3 Market Launch/Readiness
- 4.4 Resource Needs

5. Marketing Strategy

- 5.1 Customer/Constituency Outreach
- 5.2 Strategic Alliances
- 5.3 Publicity & Promotion

6. Management

- 6.1 Organizational Executive Team
- 6.2 EI Management [if different; if not, specific allocation of responsibility]
- 6.3 Board of Directors
- 6.4 [if relevant: specific advisory group for the enterprise activity]

7. Financial Plan

- 7.1 Projections: Revenue and Cost Assumptions
- 7.2 3-5 Year Projected Income Statement & Cash Flow
- 7.3 Current Financials
- 7.4 Financial Need for the EI – Amount Requested
- 7.5 Development/Fund-raising Plan

8. Risk Assessment

- 8.1 Strengths, Weaknesses, Opportunities, Threats
- 8.2 Contingency Plans

Appendices