

Elements of a Business Plan for Nonprofit Organizations

- I. Executive Summary
 - a. Big picture overview
 - b. Vision, Mission, Values statements
- II. Organization Description
 - a. History of the organization
 - b. Constituent groups served
- III. Organization Management
 - a. Leadership team
 - b. Program managers
 - c. Executive Board
- IV. Programs & Services
 - a. Describe the unique value of each program and service
- V. Operations Plan
 - a. The methods by which services and programs are delivered
 - b. The location of where services and programs are accessed
 - c. Evaluation metrics
- VI. Marketing Plan
 - a. Proposed growth and expansion plans for the organization
 - b. Outreach strategies for constituents, donors, the public
 - c. Promotional messages
- VII. Funding Request
 - a. Fundraising campaign dollar amount or amount of grant request
 - b. Details of how funds will be utilized
- VIII. Capitalization
 - a. Assets, liabilities, property and equipment owned, etc. (net worth)
- IX. Financial Projections
 - a. Sources of revenue streams and expenses
 - b. Current and 3 – 5 year projected budgets
- X. Appendix
 - a. Financial documents (Balance sheets, Income statements, Cash flow statements)
 - b. Printed marketing collaterals
 - c. Notice of awards, special recognition, proclamations from city or state

