

Chapter Twelve

Plan for Success—Business Plans



Clinic Training Program Plans for Success

In 2002, the Humane Alliance of Western North Carolina (HAWNC) began planning a new training program. An executive summary with most of the key elements of a business plan follows.

Business Description

The “How to Open a High-Volume, Low-Cost Spay/Neuter Clinic” training program will help shelters plan and operate clinics that provide free or affordable services to large numbers of animals and people in order to effectively combat animal overpopulation. Students will learn how to establish performance measures, set goals and identify standards of excellence—all of which are critical to successful clinics. They will also receive a manual of all procedures and protocol. Instruction will take place on-site at HAWNC.

Situation Analysis

Market—Developed in response to nearly constant requests for information, guidance, and opportunities to observe the HAWNC operation, the training program is targeted to animal protection professionals nationwide who are planning a high-volume, low-cost clinic.

Competition—While several national animal protection organizations offer advice and resource materials on operating spay/neuter clinics, this training is unique in the country in three ways: (1) conducted by an organization actually managing a high-volume clinic, (2) offering two full weeks of instruction in every facet of operations (most courses are 90 minutes long), and (3) including opportunities to observe operations first-hand.

Organization—The HAWNC mission is not simply to reduce companion animal overpopulation, but to end it. HAWNC has performed over 94,000 surgeries (through July 2002) and seen a 50% reduction in euthanasia at local shelters since beginning operation in 1994. HAWNC collaborates with 30 nonprofit animal welfare groups and has earned the endorsement of the North Carolina Veterinary Medical Association.

Implementation

Marketing—HAWNC will target this program to agencies evaluating or implementing clinics. Promotion will emphasize the benefits of in-depth instruction coupled with live observation of an operating clinic—helping students to make sound decisions, implement plans quickly and avoid costly mistakes. The two-week program is priced at \$5,000 to train a full clinic team of 12.

Operations—Trainings will launch in the fall of 2003; total course capacity is 12. The program consists of lecture, demonstration, and supervised hands-on work.

Human Resources—This program will be overseen by HAWNC Executive Director Quita Mazzina, and taught by a team of veterinary and animal-protection professionals who wrote and designed the curriculum.

Assessment

Performance Indicators—The program’s goal is to establish effective high-volume, targeted spay/neuter clinics throughout the country. Therefore success will be measured not only by the number of participants and their satisfaction with the training, but also by the number of students who subsequently launch viable clinics.







What I believe is that, by proper effort, we make the future almost anything we want to make it.

—Charles F. Kettering

Plan for Success—Business Plans

What is it?	A business plan is a narrative picture of what you are going to do and how you are going to do it. It includes the details of your research, analysis and decisions. The most important part of a business plan is the <i>process</i> of developing it!
Why do it?	A business plan provides a road map for board, staff and volunteers. It explains how your organization (or a program/service) will run and serves as a management tool. Additionally, business plans form the basis for foundation proposals and demonstrate to donors how their support will be used.
When?	<ul style="list-style-type: none"> • when starting a new organization • before building a new facility • before embarking on any major new initiative • to document your strategic planning
How?	Key board, staff and volunteers conduct a business planning process by thinking through every aspect of how your organization (or program/service) will run, and asking questions that uncover and test your assumptions. If you've worked through the chapters of this guide, you already have the major components of a business plan.

Key

	Ahead of the Pack
	Caution
	For More Info
	Example
	Food for Thought
	Hint

Step 1. Describe your proposed business.

Define the key programs and services your organization will offer, the new program you're launching, or the details on what you're planning for a new or renovated facility.

- Use simple language and avoid jargon.
- Wherever possible make your business description easy to read by using bulleted lists and charts.

Step 2. Analyze your situation.

Detail what you've learned in researching and identifying opportunities and challenges.

- Market**—Include information from your community assessment (Chapter 2) here.
 - Whom do you serve?
 - What are their resources and needs? How do you know?
- Industry**—Include information from your field assessment and benchmarking (Chapter 4) here.
 - What findings from the history, current trends, and issues of animal protection affect your situation?
 - What changes are anticipated in the next few years?
 - What are the most successful organizations doing?
- Competition**—Include information from your competitive analysis (Chapter 3) here.
 - How does your target audience meet its needs now?
 - Who and what represents your competition?
 - How do the cost, location, price, and benefits of your services or products stack up against the competition?
- Organization**—Look to your work measuring your status (Chapter 1) and defining your mission (Chapter 6) for information to describe your organization.
 - Who are you?
 - Why do you exist?
 - What's your history?
 - What are your strengths and weaknesses?

Step 3. Prepare assessments and contingencies.

Indicate your plans for tracking your progress, and anticipating and responding to challenges.

- Performance Indicators**—Use your status check and objectives (Chapters 1 and 8) to report the measurements and criteria you are putting in place to evaluate your success.
 - What is your timeline for checking performance indicators?
- Risk Factors & Contingency Plans**—Identify the assumptions you have made about your organization’s strengths and weaknesses (Chapter 3), your community’s needs and its interest in using your services (Chapter 2), your community’s resources and its commitment to funding your plans (Chapter 9), and your necessary limits (Chapter 10).
 - What will be the result if your assumptions are incorrect?
 - How will you change your plan accordingly?

Step 4. Prove the viability.

Make the financial case for your plans.

- Summary**—In addition to your budget and annual audit, use your financial feasibility assessment (Chapter 9) and your money management worksheets (Chapter 10).
 - What is your current financial position?
 - How much will this initiative cost? How do you know?
 - Where will the money come from and when?
 - How will the income and expenses of this endeavor affect your overall financial position in the short and long terms?
- Start-up Budget**—A detailed list of all expenses necessary to begin your initiative (include personnel and related expenses, capital expenditures, installation and set-up costs, professional costs such as legal, accounting and development consultation, insurance and initial supplies).
- Cash Flow Statement**—A one-year budget broken down by month, which shows when money comes into your organization and when it is spent in order to ascertain whether you have enough money at the beginning of every month to operate.
- Pro Forma**—Your projected operational budget (detailing income and expenses) for the first three to five years of the initiative.

Step 5. Determine implementation.

Describe how you will operate this proposed business.

Marketing

What audience(s) will you target?

What programs and services will you offer?

Where, and for how much?

How will you promote to attract customers?

Operations

What are you proposing?

What is your timeline for startup?

How will the program(s) or services(s) run on a day-to-day basis?

What are your technology, equipment and infrastructure needs?

What are your minimum and maximum limits or capacities?

Human Resources

Who will be the key staff and volunteers for your initiative?

What will their roles and responsibilities entail?

What special skills and levels of experience qualify them for the challenges they will face?

Step 6. Summarize your plan.

Write an executive summary. Make it a convincing, exciting overview of your plan that briefly (in a page or less) describes the who, what, when, where, why and how of your proposed business. (See the example on page 133.)

Step 7. Prepare cover sheets and attachments.

Professionalize your plan.

- Title Page**—Include name of the initiative, date, organization name, address, phone, fax, email, website, and contact information for key staff.
- Credits**—Provide a list of the planners and contributors.
- Table of Contents**—Make it easy for readers to navigate your document by outlining and providing page numbers for each section of your plan (and the attachments).
- Attachments**—Provide details of your research and plans, including:
 - documentation of statistics and interviews conducted in the process of business planning;
 - copies of relevant research, news, journal and magazine articles;
 - illustrations/photos of proposed buildings, renovations or programs;
 - legal agreements with architects, contractors, professional consultants and/or partners;
 - letters of support from potential funders, service recipients, partners and collaborators; and
 - resumes of key staff.

Step 8. Compile the document.

Assemble your written plan and supporting documentation in a clear, easy to read format as follows:

- Cover Sheets and Table of Contents**
- Executive Summary**
- Business Description**
- Situation Analysis**
 - Market
 - Industry
 - Competition
 - Organization
- Implementation**
 - Marketing
 - Operations
 - Human resources
- Assessment**
 - Performance indicators
 - Risk analysis and contingency plans
- Financials**
 - Financial position statement
 - Start-up
 - Cash flow
 - Pro forma
- Attachments**
 - Statistics and research
 - Building illustrations, plans and photos
 - Contacts
 - Service and/or professional agreements
 - Letters of intent or support
 - Resumes



For information on effective business plans visit www.onlinewbc.gov/docs/starting/effective_bp.html; for information on writing a business plan and a sample plan visit www.ctcnet.org/ch9.htm and www.ctcnet.org/ch9b/htm; for information on starting and funding a nonprofit organization visit www.idealists.org/tools.html#sec1; for a complete sample business plan for a nonprofit visit the about.com website at <http://sbinformation.about.com/cs/bizplansamples/> (click on the first link titled Professional Sample Business Plan); for a business plan guide for spay/neuter vans visit www.spayusa.org/resources (click on “Guidebook” to download).