



Social Enterprise Plan :

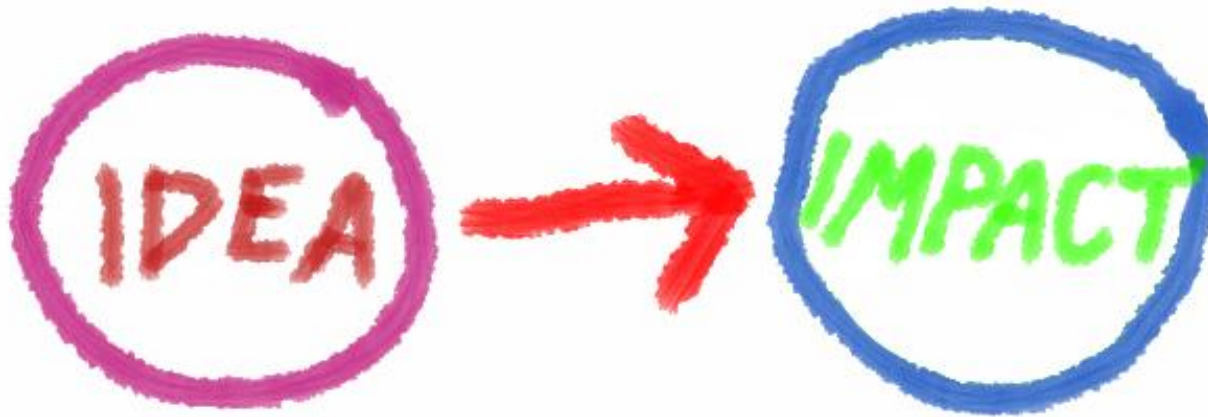
The Guide



**By Sunit Shrestha
& Sailendra Dev Appanah**



Why should I write a social enterprise plan?

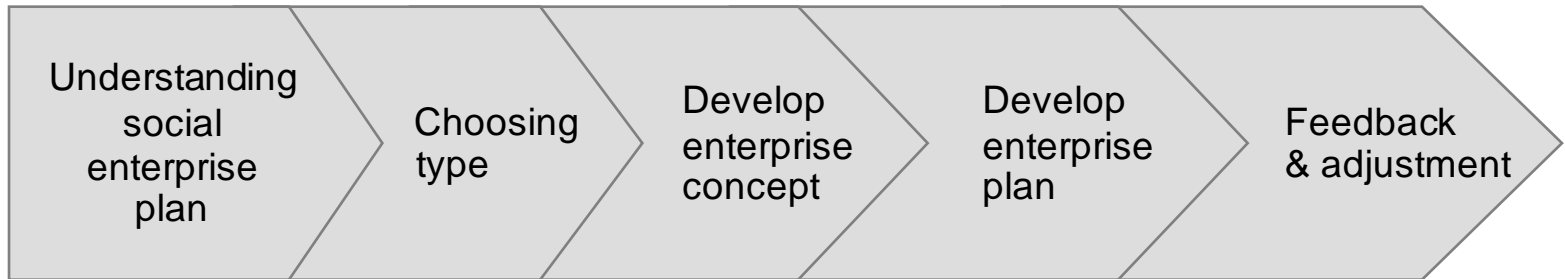


- It helps you move from solution-idea to measurable impact.
- A common plan of action among your team members.
- A document to pitch to donors, investors and other stakeholders.



Social Enterprise Planning

Social enterprise planning process



What is social enterprise?

Social entrepreneurship

Social enterprise plan as a story

Key plan's key messages (logical flow)

Social enterprise spectrum

Choice of expansion paths

Products/services/hybrid

Choosing type

What is social enterprise?

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Social enterprise plan as a story

Key plan's key messages (logical flow)

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Social entrepreneurship

Social enterprise plan as a story

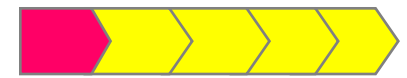
Key plan's key messages (logical flow)

What is social enterprise?

Social entrepreneurship

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Key plan's key messages (logical flow)



What is 'Social Enterprise'?



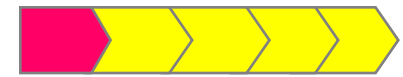
SOCIAL INNOVATION /
EFFECTIVENESS / EFFICIENCY
SUSTAINABILITY / CHANGE
HUMAN DEVELOPMENT /
FREEDOM / PASSION
EXCITEMENT / DISCIPLINE
PRIVATE-SOCIAL BENEFITS /
CREATIVE DESTRUCTION /
CONSTRUCTIVE CHANGES /
STAKEHOLDERS

Social enterprises are organizations whose *mission is to bridge social opportunity into sustainable reality innovatively, effectively and efficiently.*

They shift the future for the better by innovating social solutions to solve human development problems whether in poverty, hunger, environment, human rights, education, political freedom and other important issues.

Their teams are balancing passion, excitement, discipline, private and social benefit through organizing creative destruction of undesirable status quo as well as creating constructive changes in the world.

They focus on the sustainability of their solutions by generating strategic value to their stakeholders, which have measurable social/environmental/economic outcomes for their beneficiaries, develop strategic fit as well as social return on capital that match their donors/investors' preferences and, in many cases, earning income from products and services.



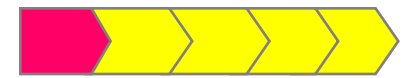
Social entrepreneurship



SOCIAL INNOVATION /
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**“Social Entrepreneurship Is about
Innovation and Impact, Not Income
We have seen that the function of entrepreneurs
is to reform or revolutionize
the pattern of production . . .”**

*Joseph A. Schumpeter, Capitalism, Socialism and
Democracy*

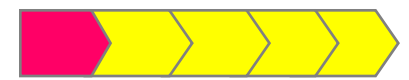


Social enterprise plan as a story



As the mission tells how social enterprise bridges social opportunity into sustainable reality. **The goal is to reach the desired mission.**

Social enterprise plan should provide a *clear story or road map on how to get from inputs to the mission of desired social impact.*



The plan's key messages:

Making a logical flow in the storyline

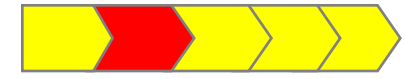
The key plan messages (the full plan)

The social enterprise process



The Enterprise's theory of change

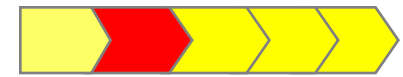




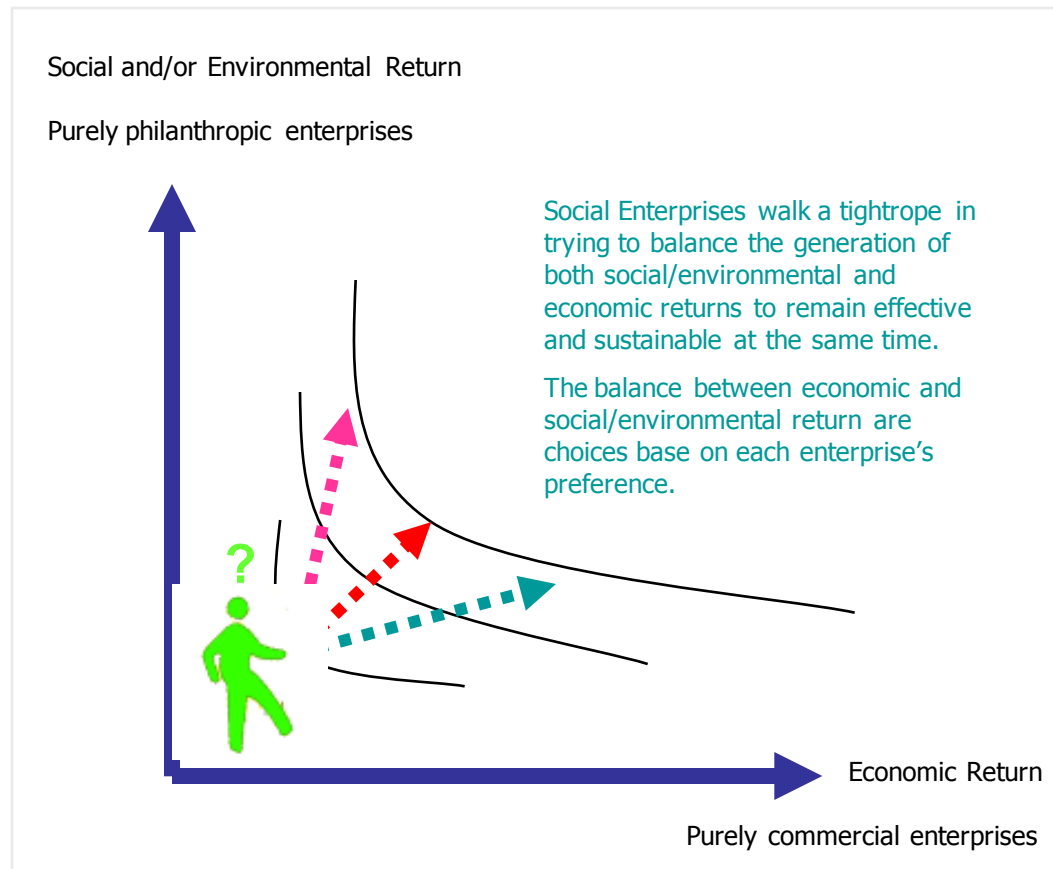
Choosing type: The Social Enterprise Spectrum

Ask yourself: What kind of social enterprise you would prefer to run?

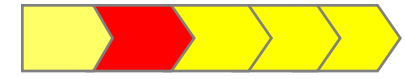
		The social enterprise spectrum		
Motives, Methods & Goals		Purely philanthropic	←————→	Purely commercial
		Appeal to goodwill Mission driven Social value	Mixed motives Mission driven & market driven Social & economic value	Appeal to self-interest Market driven Economic value
Key stakeholders	beneficiaries	Pay nothing	Subsidised rates or mix of full of payers & those who pay nothing	Market-rate prices
	capital	Donations & grants	Below-market capital, or mix of donations & market-rate capital	Market-rate capital
	workforces	Volunteers	Below-market wages, or mix of volunteers and fully paid staff	Market-rate compensation
	suppliers	Make in-kind donations	Special discounts, or mix of in-kind & full price donations	Market-rate prices



Choosing type: Choice of expansion paths



Understanding the balance you have to generate between social/ environmental and economic returns as a social entrepreneur.

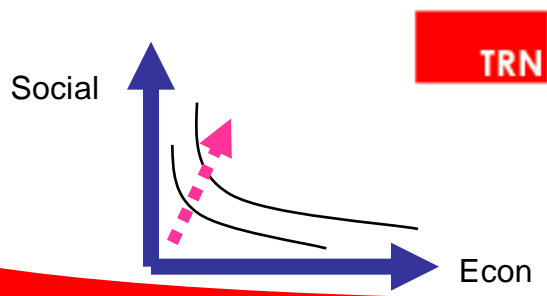
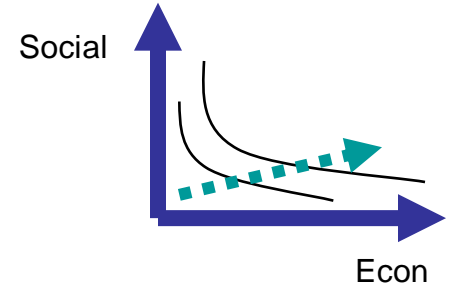
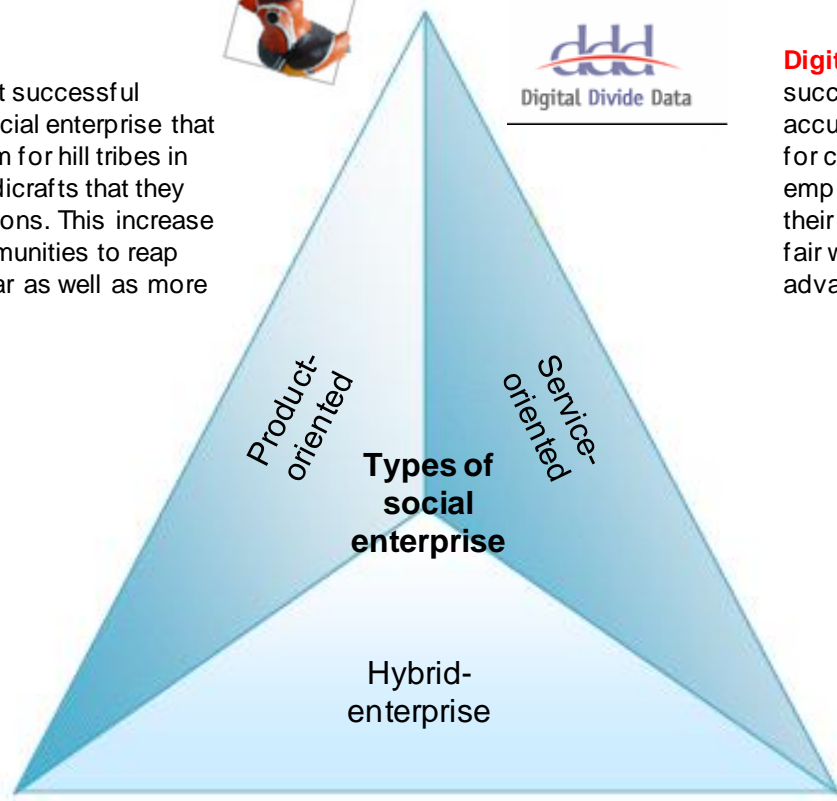
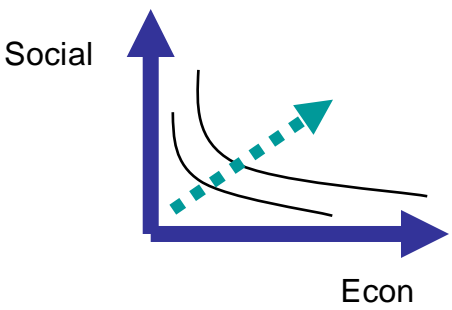


Choosing types : Product/service/hybrid

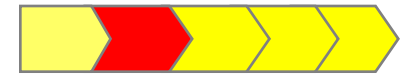
Ebannok.com is one of the most successful projects of Mirror Art Group, a social enterprise that provides an e-commerce platform for hill tribes in northern Thailand to sell the handicrafts that they produce in between harvest seasons. This increase employment and allows the communities to reap higher income levels over the year as well as more funds for development activities.



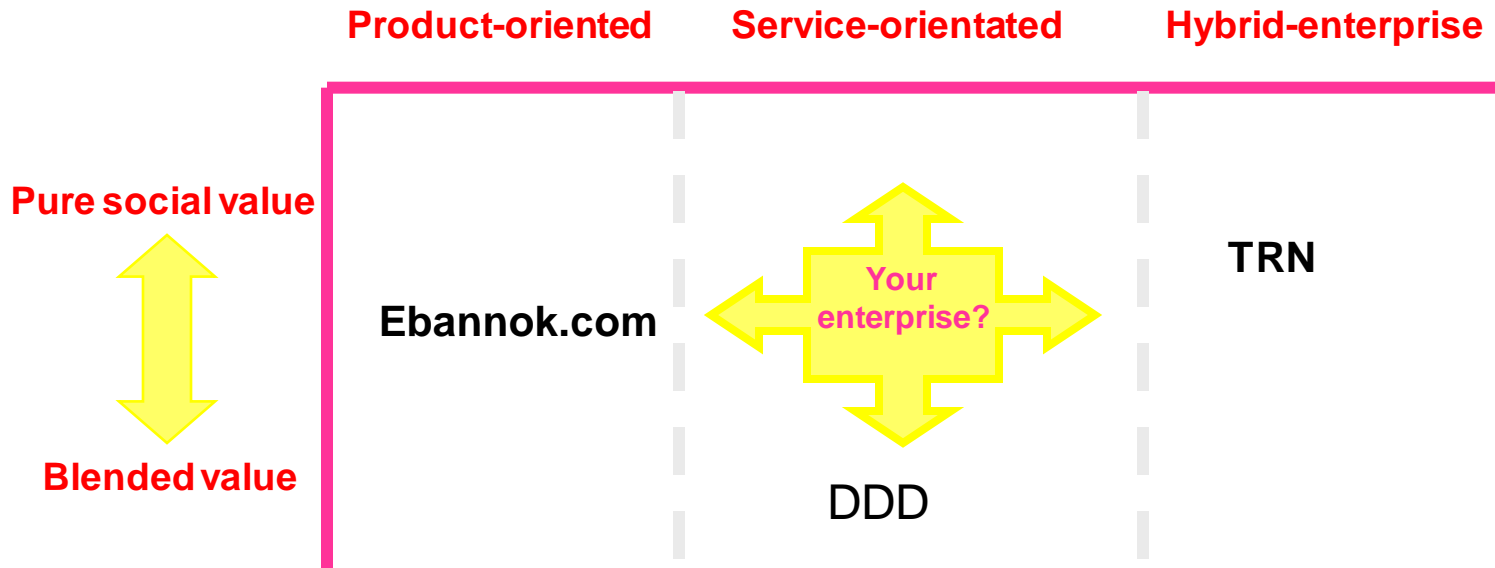
Digital Divide Data (DDD) is a very successful social enterprise that delivers highly accurate data-entry and digitization services for customers while maintaining a mission to employ underprivileged youth and facilitate their human development through providing fair wages, health care, education, and career advancement opportunities.



TRN is a social enterprise involved in various initiatives. Its flagship work involves preserving indigenous agricultural knowledge in Thailand, combining it with global best practices to deliver appropriate knowledge and best solutions using ICTs to rural communities, specifically in the northeast of Thailand.



Choosing type of social enterprise



Why do this?

By clarifying the type of social enterprise, it is easier to think through the rest of planning process. And it is easier to communicate what exactly do your enterprise does.



Social enterprise concept

What is the concept and its elements?

The Social enterprise concept is an overview of your full plan (basically your executive summary for the full proposal). It helps you think through key concepts about enterprising social innovation that needed to be clarified before expanding them in the full plan itself.

The concept elements

The problems (opportunity)

Vision and mission

Theory of change

The solution

Social impact

The team

Financial summary



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THE PROBLEMS (OPPORTUNITY)

What is the problem?

Develop the problem statement that by providing context, problem situation (initial) and desired situation (goal).

Visit 'innovative problem solving' tool.

What cause the problem?

Develop a logical argument on the causes that create the problem situation (using logical/issue pyramid)

Visit 'innovative problem solving' tool.

Why is it important, what is the scale?

Give clear explanation why the problem matter. What damage would it do, what good will it prevent, what opportunity it brings? How big is the problem and opportunity?



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VISION

What change in the world would you ultimately want to see?

Crafting a vision gives you an image of the future you seek to create. Imagine what the world would be if the problem is solved. Describe it in clarity will not only allow you to see to what direction you must shift the future to, it will also help your team developed a clear shared-vision, making sure everyone is having the same ultimate goal.

What will be the future of your organization?

A vision drives you, your team and your enterprise toward the same direction. You might want to be the *top IT-training centre for underprivileged youth*, or *eradicate poverty in a fishing village*.

If you do not have a vision, you should not be writing a plan.



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MISSION

What impact would you like to accomplish and be accountable for?

The mission would give you a sense of purpose or *the reason why your social enterprise exist*. The mission should contains clear goal and specific objectives for your social enterprise to achieve as practical steps towards your vision.

The good objectives are SMART (Specific, Measurable, Attainable, Result-focused and Timely). These objectives are the outcome or impact you will be accountable at some clear specific points in time.

It should also explain clearly what will be the value/benefit you will be creating for all your key stakeholders, e.g. target community, partners, funders, the society as a whole and even your team.

The *trick* is to describe what you will be doing over the next 1 to 2 years. Generally, it works best to focus on the enterprise and on the target groups' needs and benefits.



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THEORY OF CHANGE

What is your theory of change?

Theories of Change is a way of thinking about how the outcomes of your activities lead ultimately to your desired social impact.

For example,

If rural communities can sell their local handicraft produce through an online e-commerce platform, there will be economic development in rural communities

The basic format of any theory of change can be express as...

To make desirable **CHANGE** happen,
Condition1, Condition2, Condition(n) must be met.

Or

If Condition 1, Condition2, Condition(n) are met, then,
the desirable **CHANGE** will happen.

So, it's always something like **IF-CONDITIONS-THEN-CHANGE**



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THEORY OF CHANGE (continue)

So, more examples of IF-CONDITIONS-THEN-CHANGE

- If low-income, marginalized teenagers have first-hand experience running a business, they will be more successful in their careers
- If poor women in Africa have microbical contraceptives they control, AIDS will spread less
- If customers' water usage is metered and they have to pay for it, they will use less water
- If people buy organic yogurt instead of non-organic yogurt that may be full of pesticides, their health will improve
- If jobs are created in low-income areas, personal well-being will increase and the quality of life in those neighborhoods will increase.

Notice that in each example the ultimate social impact is expressed as a change, and increase or a decrease. This is the same thing as the social mission you are trying to achieve.

[FOR MORE ON THE THEORIES OF CHANGE CLICK HERE](#)



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THE SOLUTION

What is your solution (products or services)?

Explain exactly what is your solution to the problem, especially in term of products or services offering to your target community or stakeholder. What are key activities needed in achieving your mission?

Who are your customers?

Identify the users of your product/service solution. Who are they? Where are they? What is the size of your target customers? How do you plan to access them?

How do your solution innovatively remove the pain (solve the problem)?

Describe exactly how the problem would be solved by your solution. What benefit or value your solution will generate for the target group. Why and how innovative is your solution? Why should they use your solution compare to others? What is the limitation of your solution?



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THE SOLUTION

Who else are solving the problems?

Identify those who are trying to solve the same or similar problems as you do. What are their solutions? How effective they are? What are their problems, strength and weakness? Is the market for your solution competitive?

Who are your competitors/complimentators/partners?

Classify them into different category. Identify your competitors or those whose solutions/works are competitive to yours. Identify your complimentators or those whose solutions/works can compliment with yours. And identify your partners or those who might want to work with you.

What can do you better or different from them?

Explain how your solution is uniquely more effective or efficient compare to your competitors. What exactly is the difference between your solution and theirs.

How is ICTs a critical and integral component to your solution?

Give clear explanation why Information and Communication Technologies is needed to enhance the effectiveness of your solution and how it is integrated to your solution.



Social enterprise concept

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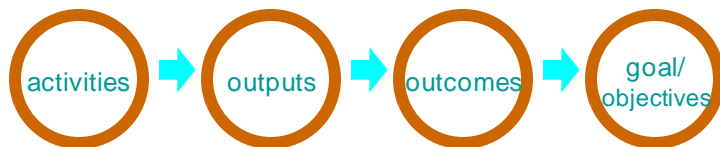
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SOCIAL IMPACT

What is your ultimate desired social change?

Explain your what social change is your final goal based on your mission and theory of change.

What are outcomes derived from your planned activities?

Group your activities into components and explain clearly what social outcomes or impact will be generated through each of these activity components. The outcomes described should have both qualitative and quantitative dimensions. Phase your outcome into quarterly (four times a year) manner.

How are these outcomes contribute to your ultimate goal?

Describe exactly how the component outcomes would contribute directly and indirectly to your ultimate desired social change. Which outcome will contribute the most? Which will have significant contribution in short-term and long-term?

How do you measure your social impact?

In what way or what technique will you be using in measuring your phased social outcomes and their contribution to your ultimate goal? What indicator will you be using in measurement? Would it be continuously measured monthly or quarterly? Who will measure the impact?



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THE TEAM

What is your human resource requirement?

Explain exactly what is your solution's needs on human resource. How many team or position will be needed to make your solution operational? What knowledge/skills are needed?

What is your advisory and mentorship needs?

Identify your needs for advisers and mentors, especially from the fields related to your solution. Who among your key stakeholders is needed in order for you to gain insight into each stakeholder as well as the support. Who you have already had as your advisers or mentors?

Who are your core team?

Explain your core team and why they are competent to deliver your solution in solving the problem. What is their education background and work-experience? What are their unique expertise?



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FINANCIAL SUMMARY

What is your financial need?

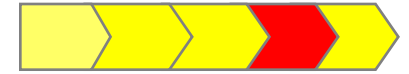
Describe what will be the major cost elements in order for you to achieve your goal. In most cases, human resources, physical facilities and technology are key cost elements. Explain what proportion will the budget will be generally allocated to each component and why it is allocated that way.

What is your budget?

Providing key budget items based on your cost elements. Break them down into activity-based costing (based your costing on each activities you will be doing) as well as those fixed cost that is pretty much the same all year round such as core staff and rent. Also explain who will be financing your budget, have you talk to them? Did they agree, in the process of proposing or reject.

How would you sustain your social enterprise?

What is your strategy in sustaining your enterprise. Would your social enterprise in the medium to long-run be based on donation, investment, earn-income or combination of them? What is your unique value that will convince your donors, investors and consumers (in case of earn-income strategy) to continuously support your social enterprise?



Social enterprise plan

The plan elements

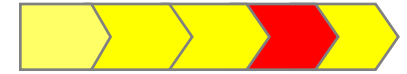
Executive summary
The problem
Vision, mission, value
Theory of change
The solution
Social impact
Target market
Competition
Social marketing
Partnership
Team plan
Financial plan
Impact monitoring & evaluation
Risk and opportunity
Implementation plan
Funding request

THE PLAN ELEMENTS

Social enterprise plan consists of many elements that guide you through the thinking in transforming your innovative solution into reality.

It basically connects your inputs requirement all the way to the final impact mission.

Without the plan, you will have a messy project implementation nightmare even you've somehow got financed. ☹



Social enterprise plan

The plan elements

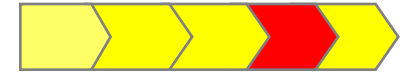
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EXECUTIVE SUMMARY

Here you should provide a summary of the plan so that the reader could understand the key elements of your whole social enterprise right away. You can actually work on this section after you have finished all other plan elements.

- You should outline briefly your...
- Vision, mission, value
- Theory of change
- The solution
- Your target and how you would access them
- Partnership
- Finance
- Evaluation



Social enterprise plan

The plan elements

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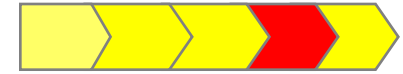
THE PROBLEM / VISION, MISSION AND **VALUE**. THEORY OF CHANGE, THE SOLUTION, SOCIAL IMPACT

These elements are actually part of the social enterprise concept except for the **VALUE**. Therefore, you could use the same or update the information from the concept's elements.

THE VALUE

How will you behave along the way? – Your guiding concepts, beliefs, principles and underlying philosophy of the enterprise are outlined here. Your value should be of those principles your enterprise considered as critically important to its culture, integrity, meaning and day-to-day activities.

For example,
you might be running an enterprise that trains underprivileged youth in IT skills. You might want to make it a principle to **recruit a more diverse group of young people** (from across all ethnic, linguistic and socioeconomic groups). On the other hand, you might want to **promote continuous collaboration amongst your team members** to broaden and enhance your enterprises' ability to serve the target group. Or even make a priority to **ensure gender balance** in all your operations.



Social enterprise plan

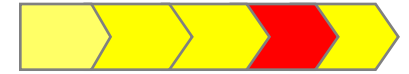
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TARGET MARKET

Identify and give details on the target group of your social enterprise. They are those who you will make an impact with. You should exhaustively segment them into differentiated groups as well as classify which group is primary target and which is secondary. Information about their size, value, challenge/opportunity and other notes should also be provided.

Target segments	Size	Value	Challenge/ Opportunity	Validation
Primary				
Segment A xxxxxx	xxxxxxxx	xxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
Secondary				
Segment B xxxxxx	xxxxxxxx	xxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
Segment C xxxxxx	xxxxxxxx	xxxxxxxxxxx	xxxxxxxxxxxxx	xxxxxxxxxxxxx
Identify key user segments that will be benefiting from your social product/service. Each segmentation should share similar attributes (demographic, interest, needs, life-style, age, income, etc.) Classify which segment is primary or secondary.	Estimate the size of each segment in term of number of people, villages, population and so on.	Explain key needs of each segment and why it is satisfied by you. What is your value to them?	What are unique challenge and opportunity to each segment. How do you overcome or capitalize them?	Provide evidences that clearly validate why there is a real need in this segment and/or that they are interested in your or similar social product/service.



Social enterprise plan

COMPETITION

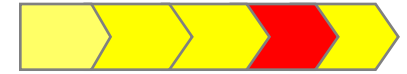
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In providing your social products/services, you actually have competitors providing similar value. Although in social development you are not in cut-throat competition, but by understanding who are providing similar value to your target groups, it helps you to plan your positioning compare to others in capturing unique value to better addressing your target groups' needs.

Your competitors include direct competition, substitutable products/services and potential entrants. Complimentators, or those providing complimentary services are equally important.

Competitors and their services	Type	Differentiation and competitive strategy
Competitor A provides xxxx services xxxxx xxxxxxxxxxxxxxxx	Direct	xx
Competitor B xxxxxx	Substitution	xx
Identify key competitors providing similar, substitutable or complimenting products/services.	Classify type of competitors; direct, substitution, new entrant or complimentary.	Explain why your social products/services are different from the competitors (through feature, unique value, etc..) What can you learn from them? How will you compete or cooperate in order to maximize the social impact and sustainability of your social enterprise?



Social enterprise plan

SOCIAL MARKETING

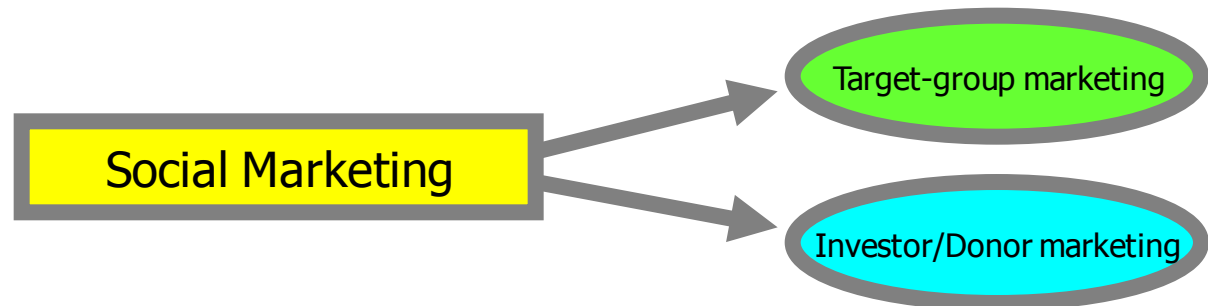
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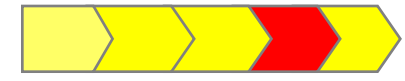
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Any enterprise's ultimate clients that are critical to their survival fall into two groups. As in business enterprise where the two are customers and investors. Social entrepreneurs need to be equipped with a two pronged marketing approach in serving their target users group and donors/investors.

Two different types of marketing campaigns have to be designed to satisfy the donors and to obtain the attention of the target groups.

Both groups have to be told clearly of what they can expect from your social enterprise.





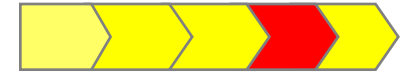
Social enterprise plan

SOCIAL MARKETING

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TARGETS	Wants & needs	Access strategy	Relationship building
TARGET USERS			
Target segment 1	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX
Target segment 2	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX
INVESTOR/DONOR			
Investor1	XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX
Donor 2	XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX
General public	XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX
Identify key users segments, donors, investors that are crucial in achieving your mission and sustainability. Information about their locations should be provided.	Explain wants & needs of each group, especially those that are perceived as immediate and important in order to know what will attract their attentions.	Explain how will you access each of these groups. What communication channel will you be using (traditional media, internet, event, social network, etc.) How to attract them?	Once you've access to them. How will you build trusting relationship? What technique will you be using? (visiting, meeting, emailing, calling, etc.) In business enterprise, this is call Customer Relationship Management (CRM) and Investor Relations (IR).



Social enterprise plan

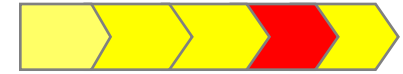
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As no one can be the best at everything, partners are needed in order to maximize your social impact. These are people and organizations that care about your mission. You share the similar goal to them. They might be in the field longer than you, they might have competency that you can't match. What is important is to identify and learn how to work together in order to achieve synergy, i.e. the whole impact of partnership is greater than the sum of its parts. Partnership only make sense when together you can achieve something that each of you can't do it alone.

Partner	Value contribution	Strategic fit	Status
Partner1	xxxxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxx	Agreed
Partner2	xxxxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxx	Contacting
Identify partners that will be needed in order to achieving the mission, especially in term of competency need.	Explain what value that each partner bring to the partnership. What is unique contribution derive from each partner? Are they highly competent, experienced, connected? Why do your social enterprise need them.	Why will they need or want to work with you? Do your mission/activities fit with theirs? What is the value your social enterprise have for each of them? What is the synergy between you and them?	Describe the status of partnership. Did you contact them? Did they agree to work as partner? Do you have their management support?



Social enterprise plan

TEAM PLAN

Creating a team plan is also part of social enterprise concept's elements. At a social enterprise plan level, we need to work out some details. Social enterprise consists of individuals, they are the team that make or break everything. Team plan is among the most important element in planning as talent is everything. The team plan consist of at least three parts, the competency plan, the core team and the advisors/board.

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COMPETENCY PLAN

<u>Talent needs</u>	<u>Position requirement</u>	<u>Recruitment</u>	<u>Status</u>
Talent1	xxxxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxx	Recruited
Talent2	xxxxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxx	Searching
Identify key talents needed to achieve your mission. Generally you would need management talent, technical talent depending on which area you are working on, administrative talent and so on. You should assert key talent characteristic as well, e.g. managerial talent with special focus on innovation and partnership building.	Base on your identified talent needs. What positions and how many are needed to match those talents needed? What background and experience do you need for each position? Which position is short-term, long-term, part-time? What kind of attitudes do you need for each of your positions, energetic yet patient?	How do you plan to recruit each of the position required? Where are the potential recruits stay? How do you access to them? What will attract them?	Describe the recruitment status, whether the position is recruited, contacted or still in searching.



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THE CORE TEAM

Name/Position	Talent	Background/experience
Name1 Position: Team lead/director	xxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxx
Name2 Position: ICT manager	xxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxx
.....		
Provides names and positions of the core team members.	What are their talents? Explain shortly their unique competency, what they can do? what are the skills they are particularly great?	Provides a summary of their background and experiences. Key important things to include are education, certification, citizenship, interest, work experiences (part-time, full-time), past unique contribution to business/social ventures or conferences, personal membership/networks. And any other thing to prove that the person is uniquely fit for the task, the mission and the team as a whole



Social enterprise plan

TEAM PLAN

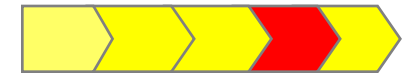
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ADVISORS/BOARD

Name	Role	Talent	Background/experience
Name1	xxxxxxxxxx xxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxx	xx xx
Name2	xxxxxxxxxx xxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxx	xx xx
....			

Names	Identify role as well as responsibility of each advisor/board members.	What are their talents? Explain shortly their unique contribution to the social enterprise as advisor/board member.	Provides a summary of their background and experiences. Key important things to include are education, certification, citizenship, interest, work experiences (part-time, full-time), past unique contribution to business/social ventures or conferences, personal membership/networks. And any other thing to prove that the person is uniquely fit the role, the mission and the team as a whole d
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FINANCIAL PLAN

The planning and management of your money or financials are among the most critical tasks in determining whether the social enterprise would be cost-effective and sustainable. There are at least three elements in social enterprise financial plan to consider, namely, the budget, the fund-raising plan and the revenue-expense projection.

THE BUDGET

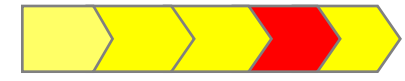
Expense category	Expense items	Cost	Total
Management	Compensation (12m x 2persons)	xxxxxxxxxxxxxxxxxxxx	5,000 USD
	xxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxx	xxxxxxx
Category2	xxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxx	xxxxxxx

Identify key expense category by grouping all expense items into various groups. Generally it consists of human resources, physical facilities, technologies, activities and so on.

Outline all expense items. Try to break them down into understandable elements. However, you do not need to break it down so small that the expense items for 15,000 USD project will take 3 pages long. Try to explain some items that other people might find it difficult to understand or why it is really needed. Quantity and unit information should also be provided.

Describe the cost for each of the item.

Sum total on each line. Make sure you **BOLD** the final total sum.



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FUND RAISING

The activity	The expected profit	The requirement
Activity1 Explanation of activity1	3,000- 5,000 USD	Partnership with XYZ media, USD 1500 cost xx
Activity2 Explanation of activity2	xxxxxxxxxxxxxxxxxxxxxxxxxxxx	xx xx
.....		
Provide key fund-raising activities. Generally they are special event and sales of good/services or other special revenue such as those coming from interest rate from project saving or endowment fund.	How much do you expect to profit from each of the activity. You can give the expectation in range, such as from 3,000 to 5,000 dollars.	Explain what are the requirements that must be satisfied in order to make each of the fund-raising activity possible. Most of the time, it is some initial investment (cost), partnership with other organizations, specially competency needs (satisfied by hiring a part-time for the activity) and so on. Risk factors such as whether condition or inability to attract media interest should also be provided for each planned fund-raising activities.



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REVENUE-EXPENSE PROJECTION

Month	Revenue	Expense	Balance
January	15,000USD Grant	3,000	13,000
Febuary	non	2,000	11,000
....
September		7,000	- 1,000*****

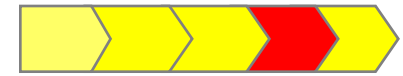
Alternatively, if you are not sure about when will you start the project, you can use number instead of the month's names.

Provide total estimated revenue in that particular month.

Provide total estimated expense of that particular month.

Calculate the net balance for each month's end. This is of extreme importance because it will help you think through your money situation, especially when will be the crisis time!

Don't forget that the balance is not the revenue minus expense for each month, you must include what was left from the last month's net balance as well.



Social enterprise plan

MONITORING & EVALUATION

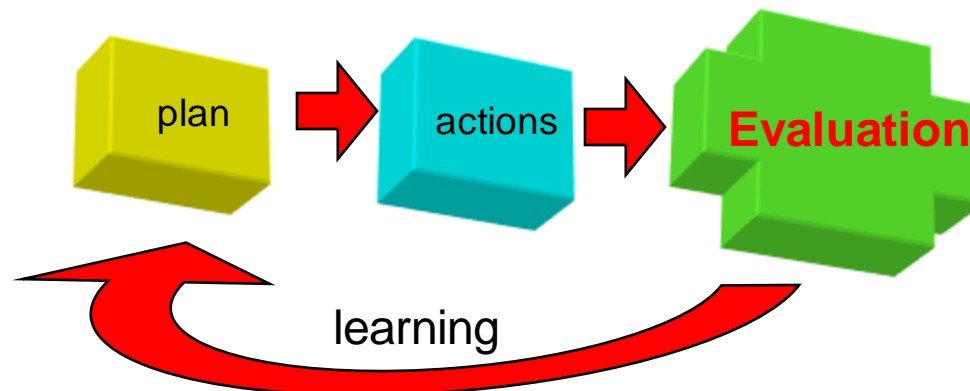
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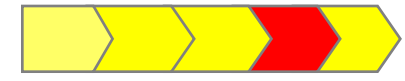
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What can't be measured? What can't be managed? That seems to be one of the most important modern management mantra. **In social enterprise management, measuring your performance allows you to learn much more about how your idea performs in the real world.**

Monitoring and evaluation are not simply meant for funders or partners, they are most useful to you. Without measurement, you would not know how to adapt your plan and action in order to achieve highest impact and sustainability. Continuous evaluation ensures a better learning ability.

Of course, the process can be difficult and complicated. But at least you should focus on developing your evaluative logical model.





Social enterprise plan

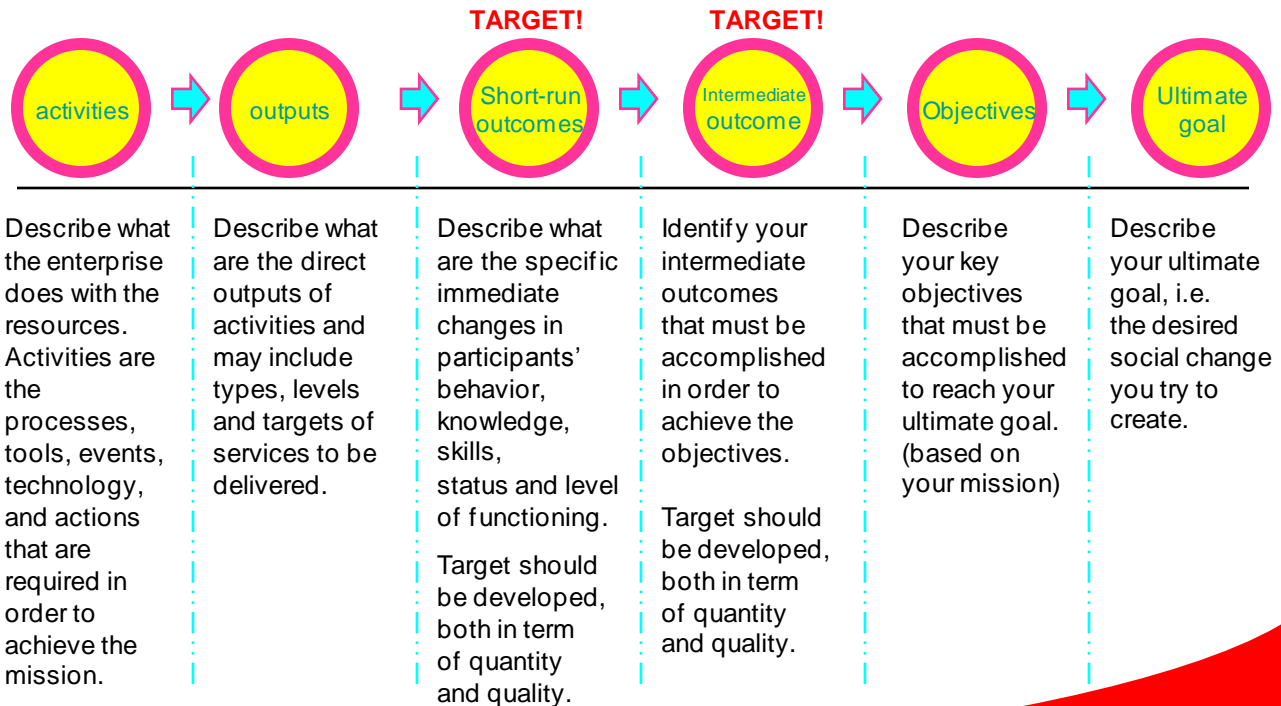
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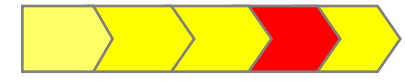
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Evaluative logical model

A Logical model (LM) allows you to link your inputs, outputs, activities, outcomes and goals together. For evaluation purposes, the most important basic task is to be able to logically link your activities, outputs, short-term outcomes, intermediate outcomes and final goal together.





Social enterprise plan

MONITORING & EVALUATION

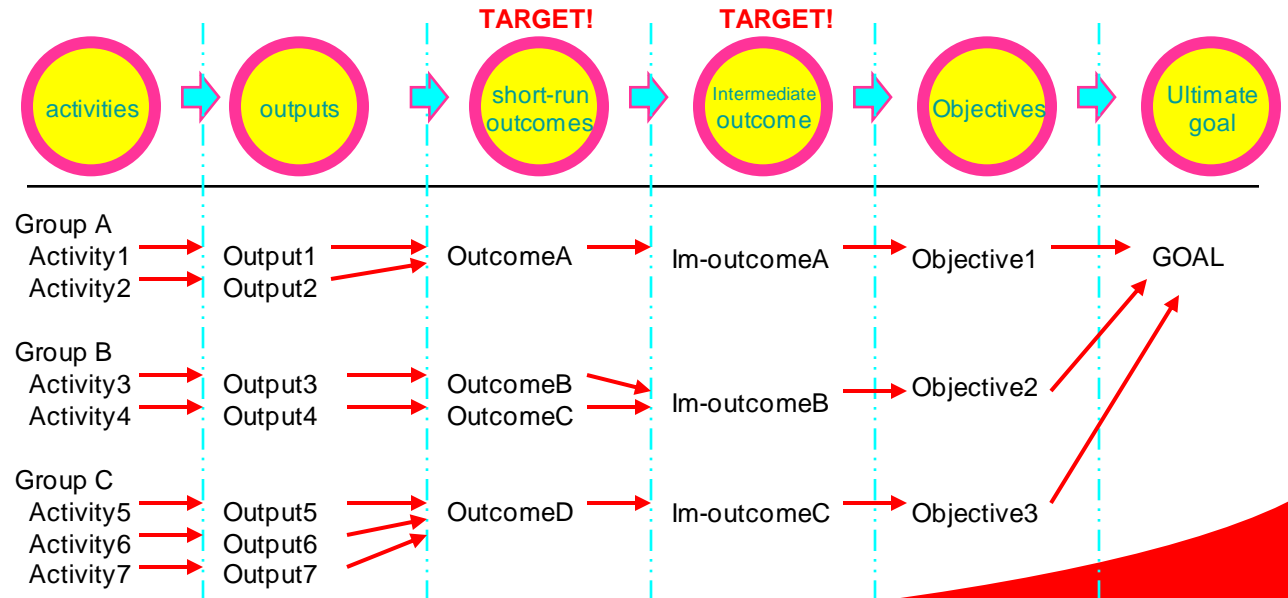
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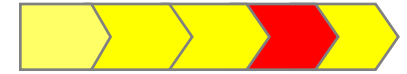
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Evaluative logical model

This evaluative logical model provides a clear idea on how your activities link all the way to your ultimate goal. It also give a clear outcome targeting both in short and medium term.

Therefore, you can easily use this target model as a guide to measure against the actual performance in order to see what is the difference between the plan and the actual whether in activities, outputs, short-term outcomes, intermediate outcomes and objectives. You can monitor and evaluate your project monthly, quarterly, annually or other appropriate timing.





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Beyond basic logical model

There are many other evaluative techniques such as a more comprehensive logical modeling and theory of change, as well as balance score-card that allow you to integratively measure operations, financial, customers and learning/growth perspectives.

No matter which technique you will be adopting, the key is to be able to answer the following questions.

- What outcomes are you trying to achieve for your target population?
- How will you measure whether you've achieved these outcomes?
- What are your performance targets?
 - What data will you collect and how will you collect it?
 - How will you use the results for learning and reporting?



Social enterprise plan

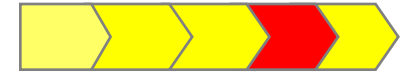
RISKS AND OPPORTUNITIES

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You cannot see into the future with certainty, but you can do the next best thing: identify potential risks and opportunities that will affect your plan. Try to predict and imagine the potential risks that could create a minor or major problem for your social enterprise. Also, think of the opposite, what opportunities might excel the ability to achieve your mission and scale the impact.

Risk/Opportunity	Potential impact	Prevention/Capitalizing
Risk1 Xxxx	Extremely dangerous xxxxxxxxxxxxxxxxxxxxxx	Preventive action 1 xxxxxxxxxxxxxxxxxxxxxx
Opportunity1	Very high	Capitalizing action 1
Identify key risk and opportunity that will either make or break your plan.	Describe degree of potential impact (Extreme, very high, high, medium, low)	Describe how you could prevent various risks from happening as well as how you could capitalize or capture the opportunity In order to safe-guard and increase the effectiveness of your plan.



Social enterprise plan

IMPLEMENTATION PLAN

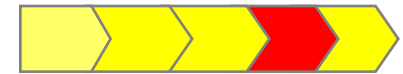
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An action plan is critical to the success of the social enterprise, no matter how ingenious the strategy or concepts that are developed. This is because every idea/thought must be translated into action. Therefore, the implementation plan will assign responsibility of the tasks and the scheduling of the deliverables and necessary resources. Therefore, it is important to clearly establish tasks accountability and a realistic work schedule.

The Work Breakdown Structure (WBS) is a tool that can help you develop estimates, assign personnel, track progress, and show the scope of project work. Through this tool complex activity is subdivided into several smaller tasks. This can be continued until the activity can no longer be subdivided.

Work Breakdown Framework			
General Definition of Project:			
Major Task	Subtask 1	Date/Time/Duration	Team assignment
	Subtask 2		



Social enterprise plan

IMPLEMENTATION PLAN

The plan elements

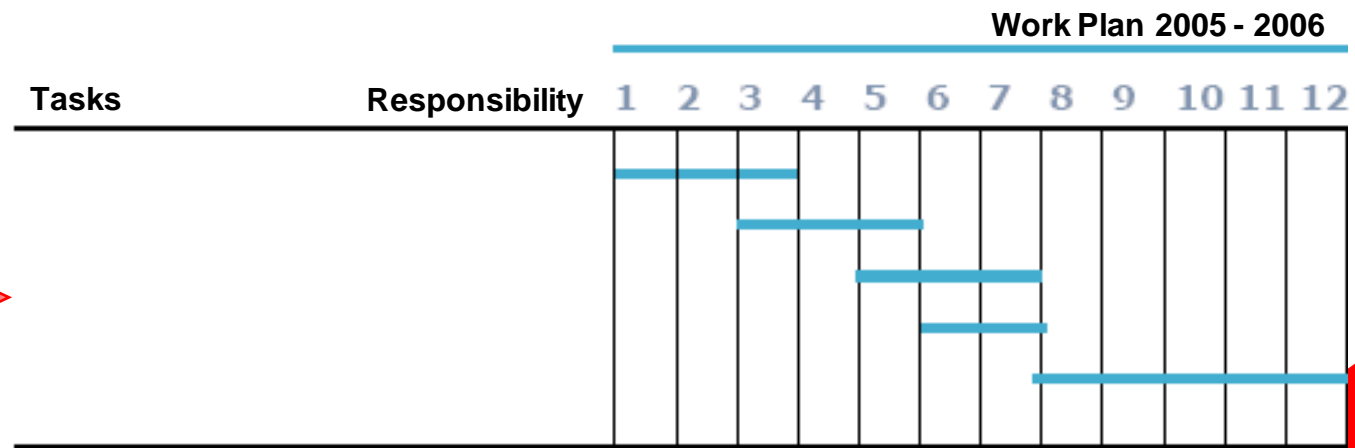
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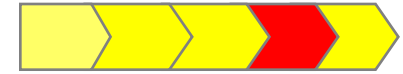
A Gantt chart can tell you what has to be done—the activities or tasks how long each activity will take in what order each activity has to happen what the costs will be for each activity who is going to be responsible for the activities

Gantt Charts are the basic bar chart that most people are familiar with.

Pros: Simple to construct, easy to read, an effective way to communicate with team members what they need to do in a given time frame.

Cons: Difficult to assess the impact of a change in one area on the rest of the project.





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FUNDING REQUEST

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Funding request

Provides information on how you are requesting funding from different donors/investors. You could restate the budget and break it down to the part requesting for funding from Youth Social Enterprise Fund and other donors/investors. Status of each request should be described as well.

BUDGET CATEGORY	BUDGET ITEMS	COST	REQUEST	STATUS
Management	Compensation (12m x 2persons) xxxxxxxxxxxxxxxxxxxxxx	5,000 USD xxxxxxx	} YSEI Fund	Submitted
Category2	xxxxxxxxxxxxxxxxxxxxxx	xxxxxxx		
Category3	xxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxx	xxxxxxx xxxxxxx		
Category4	xxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxx	xxxxxxx xxxxxxx		
.....	} UNDP	Committed
.....		
	TOTAL	xxxxxxxUSD		



RESOURCES FOR SOCIAL ENTERPRISE PLAN

Business Plan Basics, Robin Jones, Freescale Semiconductor

Conceitos Básicos de um Plano de Negócio para OSCs, Center for Social Entrepreneurship, Ashoka and McKinsey & Company

An introduction to business planning for non-profit, Zoe Brookes, The Bridgespan Group (non-profit initiative of Bain & Co.)

Logic Model Development Guide / Evaluation Handbook, W.K. Kellogg Foundation

Developing a Social Enterprise Business Plan, Stacey Childress, Harvard Business School

Financing Social Enterprise, Michael Chu, HBS Business Plan Contest & Social Enterprise Club

A BRIEF TUTORIAL ON BUSINESS PLANNING FOR NONPROFIT ENTERPRISE, Cynthia W. Massarsky

Theory of change as a tool for strategic planning, Andrea A. Anderson, The Aspen Institute

Theory of change, guided example: PROJECT SUPERWOMEN, ActKnowledge and the Aspen Institute