

## SCORE Chapter 631 – “Business Plan” Evaluation Form

SCORE Client’s Name \_\_\_\_\_

Date \_\_\_\_\_

Name of Nonprofit Organization \_\_\_\_\_

This evaluation is offered in a spirit of helpfulness by \_\_\_\_\_

Category	Rating* (Circle one)	Comments (required for rating of 3 or 4)
PREPARATION Much research, organization, and formatting?	1 2 3 4	
QUALITY OF WRITING Good grammar, and thoughts flowed?	1 2 3 4	
LOGICAL Roadmap to success?	1 2 3 4	
EXECUTIVE SUMMARY Overview of “business” plan	1 2 3 4	
NONPROFIT DESCRIPTION Overview of the “business”	1 2 3 4	
PRODUCTS & SERVICES Description of what the nonprofit does	1 2 3 4	
MANAGEMENT & OPERATIONS Description of who and how work is done	1 2 3 4	
INDUSTRY ANALYSIS What industry does the nonprofit fit into?	1 2 3 4	
MARKET ANALYSIS Who are the customers and competitors?	1 2 3 4	
MARKETING & REVENUE PLAN How is the word going to be gotten out?	1 2 3 4	
FUNDRAISING PLAN How are donations going to be attracted?	1 2 3 4	
REVENUE & DONATION PROJECTIONS What total funds can be counted on?	1 2 3 4	
FINANCIAL STATEMENTS The numbers!	1 2 3 4	

**OTHER COMMENTS**    To improve your business plan I suggest:

**\*Rating Guide** 1=Excellent 2=Very Good 3=Acceptable 4=Needs Improvement

## **Section 1: Executive Summary**

*In simple terms what is the “business” model for your nonprofit organization (NPO)? What are the immediate goals of your NPO? How does the NPO plan to achieve its goals?*

*Describe the current status of the NPO. When was it founded? Identify the management. Describe the management’s experience and capabilities.*

## **Section 2: Nonprofit Organization Description**

*What is the NPO’s mission statement?*

*Provide the NPO’s ID information: legal name, date founded, NPO address, phone number, fax number, and email address.*

*Describe the NPO’s legal structure (sole proprietorship, partnership, corporation, and so on). Describe ownership. If there is more than one owner, list all owners and give ownership percentages.*

*Give a brief overview of marketing and fundraising strategies. If applicable, describe the Web site and how business will be conducted via the Internet.*

## **Section 3: Products and Services**

*Briefly describe your products and/or services.*

*What are the benefits and features of your product and/or services? Provide a clear description of each.*

*What is your Unique Sales Proposition (USP)?*

*Describe how you plan to keep the promises in your USP. How will your USP make customers’ lives easier?*

## **Section 4: Management and Operations**

*Describe the professional history of the owner.*

*Describe specific accomplishments of management (owner) that will benefit the new NPO.*

*Describe duties and responsibilities.*

*Describe the operations of the NPO.*

## **Section 5: Industry Analysis**

*Describe the industry. Provide general overview of products offered and/or services included therein.*

*How large is the industry?*

*Is the industry growing, declining, or steady?*

## **Section 6: Market Analysis**

*Describe the local marketplace. How large is it potentially?*

*How much of the local market share can the NPO capture? What barriers must be overcome to capture market share?*

*Describe customers demographically and geographically. How much do customers spend locally? What are their purchasing habits?*

*Describe how customers get information to make purchasing decisions. How will you best convey the benefits and features of your products and/or services to potential customers?*

*Describe your proposed choice of advertising media (newspapers, radio, outdoor, etc). Why do you think your choice will be effective? How do you plan to monitor the effectiveness of the advertising campaigns?*

*How will public relations and publicity play in your marketing plans?*

*Identify five similar NPOs. What are they doing that is successful? What practices do they employ that you want to avoid? How do you plan to adopt their successful practices or to improve them?*

*Are any of these similar NPOs likely to be your competitors? If so, explain.*

*How much do similar NPOs charge for their products and/or services? Will you be able to use similar pricing structures? Why or why not?*

## **Section 7: Marketing and Revenue Plan**

*What is the overall marketing and revenue-generation strategy that the NPO will use to capture market share?*

***What are your revenue goals for Year 1? Year 2? Year 3?***

***How do you plan to control costs?***

***Describe the marketing and revenue-generation programs (advertising, public relations, Internet, special events, direct mail, email, ezines, etc).***

***What services are most important to the customers? How does the NPO plan to satisfy customers' requirements? How will the NPO monitor customer satisfaction?***

## **Section 8: Fundraising Plan**

***What are your fundraising goals for Year 1? Year 2? Year 3?***

***How do you plan to control costs?***

***Do you know how to fundraise? Will you have to hire a fundraising expert to administer your fundraising plan?***

***Describe your annual giving program.***

***Can you seek major gifts at the outset? When do you expect to seek major gifts?***

***Will you be using volunteers to help run your NPO? If so, can the volunteers be counted on to make donations?***

***Who is on your board of directors (BOD)? How much will each of your BOD's directors promise to give annually in order for you to allow them to be on your BOD?***

***How many of your BOD can help in fundraising efforts?***

***What foundations can help in supporting your NPO? Who will be preparing grant applications in hopes of getting foundation contributions?***

***Will you be having special events in order to raise funds?***

***How will your Web site help in your fundraising efforts?***

## **Section 9: Revenue and Donation Projections**

***Compute start-up capital requirements. Itemize how the funds are to be spent.***

***Project revenues, donations, and expenses for three years. Will the NPO enjoy a positive cash flow?***

## **Section 10: Financial Statements**

***A complete set of projected financial statements must be developed for three years.***