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**Programme Plan  
Template**

**People don’t plan to fail…  
…they simply fail to plan**

*(Old proverb)*

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**Template for a Programme Plan**

# Executive summary

*(It is suggested that you complete this section* ***AFTER*** *you have completed the other sections of the Programme Plan).  
It needs to be just a short overview:*

* *less than one page, readable in less than one minute – at this stage people just want the gist of the main points:*
* *focus on the main proposals and intended outcomes;*
* *the intention is to capture the reader’s attention sufficiently to entice them to read the rest;*
* *a few small relevant illustrations can be helpful to catch attention.*

## Short overview of the charity’s objects: DON’T use the text of the “official” objects (ie: as in the governing document). That comes later. Just use a simple 2-3 line summary in “ordinary” language rather than Charities Act legalese.

## A brief summary of the charity’s main beneficiaries.

## A list, with just brief explanatory notes, of the MAIN activities proposed by the charity in its Programme Plan and the main PUBLIC benefits each is intended to deliver.

## A brief summary of the key features that the charity will use to demonstrate achievement of the intended benefits. NO DETAIL required here – that comes later

## A short note of any SIGNIFICANT new/additional resources (staff, accommodation, equipment, finance) that will be required to deliver the proposed plan efficiently and effectively.

## A short note of any SIGNIFICANT opportunities and threats that the Trustees have taken into consideration in proposing the Programme Plan (but NOT how you plan to deal with them – that comes later).

# Organisation Details

## Charity Name:

## Address:

## Telephone number:

## E-Mail:

## Website:

## Legal status:

## Charity Reg.No: xxx HMRC Reg.No: xxx

# What the Organisation Does

## Our Charitable Purposes (from the governing document)

## Our Vision

## Our Mission Statement

## Our Values

## Our Activities

# Background & Achievements to Date

# Our Goals

## In the Next Year

## In the Next 2-3 Years

# The Public Benefit Need

## What is the Public Need?

## Who Will Benefit from the Organisation’s Activities?

## How Will They Benefit?

## What Similar Services Are Currently Available?

## What is the Unfulfilled Need?

## How the Organisation Will Integrate with Other Activities/Providers?

# SWOT Analysis

## Strengths:

What is the charity good at?

How well known is the charity for the range and quality of the work it does?

What is the charity able to do that other charities can’t do, or can’t do as well?

What skills and experience do the Trustees/volunteers/staff have that are of particular benefit to the charity’s activities?

What resources (equipment, premises) does the charity have that are of particular benefit to the charity’s activities?

What local factors (*eg:* easy access to services or resources) are an advantage to the charity’s activities?

Do any of the skills/expertise held by the charity’s trustees/volunteers/staff create any conflicts of interest?

## Weaknesses:

What is the charity not good at? Is there any training or other support available?

Are the available resources (volunteers, staff, equipment, premises) adequate and fit-for-purpose?

What skills, resources does the charity need to acquire?

What activities should the charity focus on?

What activities should the charity avoid?

## Opportunities

New sources of funding (grants)

New sources of funding (service contracts)

New donor/fundraising opportunities

New sources of volunteers (eg: partnerships with other local groups)

New/additional accommodation possibilities

Demand for additional levels of services/activities

Demand for new services/activities (within the charities charitable objects)

## Threats

Withdrawal of funding

Loss of service contract

Loss of staff/volunteers

Loss of accommodation

Replacement of vital worn-out equipment unaffordable

Drop in demand for services/activities (eg: due to other charities/services opening in the area)

# SMART Analysis

## Specific

Are the charity’s objectives, and its activities to deliver those objectives, clear to and understood by all the stakeholders, particularly: Beneficiaries; Trustees, Volunteers, Staff, Funders/Donors?

## Measurable

Have you identified appropriate Key Performance Indicators (KPIs) that the charity can measure accurately and reliably?

Are those KPIs capable of being analysed to produce meaningful indicators of the charity’s achievements against its targets?

## Achievable

What steps have you taken to check that the intended outcomes of your charitable activities can, realistically, be achieved by those activities?

## Relevant

What steps have you taken to check that your proposed activities will actually produce identifiable benefits for both the charity’s immediate beneficiaries and for the public benefit?

## Timely

What steps have you taken to check that your proposed activities can deliver the intended outcomes in good time to meet the beneficiaries’ needs?

What steps have you taken to ensure that your current/proposed activities are the best and most efficient/effective use of your resources?

What steps have you taken to ensure that your activities integrate well (ie: complement rather than conflict with) other activities in the charity’s catchment area?

# Performance Monitoring

## Key Performance Indicators

## Measurement of KPIs

## Reporting of KPIs

# Promotion and advertising

## How & Where Will You Promote Your Activities/Services?

# Managing Risks

## For each identified risk: Nature of risk (including specific location, if relevant); Who is affected by the risk Impact: Likelihood: Mitigation: (What is being done to reduce the risk); Monitoring: (Ensuring that the mitigations are in place and working?) Responsibility: Who is responsible for monitoring the risk and for taking the lead in implementing appropriate action if the risk should actually occur?

*Repeat section 21.1 as often as required*

# Running the Organisation

## Board of Trustees

## Executives and/or Senior Management

## Staff (Including Volunteers)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Role (& Hrs)** | **Salary £\*** | **Experience** | **Skills / Qualifications** | **Yr-1** | **Yr-2** | **Yr-3** |
|  |  |  |  |  |  |  |

***\* Including on-costs***

## Accommodation

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Type** | **Location** | **Special Requirements** | **£, Yr-1** | **£, Yr-2** | **£, Yr-3** |
|  |  |  |  |  |  |

## New Equipment

|  |  |  |  |
| --- | --- | --- | --- |
| **Description** | **£, Yr-1** | **£, Yr-2** | **£, Yr-3** |
|  |  |  |  |

## Consumables

|  |  |  |  |
| --- | --- | --- | --- |
| **Description** | **£, Yr-1** | **£, Yr-2** | **£, Yr-3** |
|  |  |  |  |

## Policies & Procedures (Add/Delete/Amend as appropriate)

The Organisation has the following Policies & Procedures in place.   
The date following each title is the date of the latest revision.

Bullying & Harassment 01-Jan-12

Code of Behaviour 01-Jan-12

Conflicts of Interest 01-Jan-12

Equal Opportunities 01-Jan-12

Financial Management 01-Jan-12

Health & Safety 01-Jan-12

Safeguarding Children & Young People 01-Jan-12

Safeguarding Vulnerable Adults 01-Jan-12

Safe Recruitment 01-Jan-12

Supervision 01-Jan-12

Whistle-Blowing 01-Jan-12

*Copies of the above Policies & Procedures are available on request.*

# Fundraising Strategy

## General Funds

## Restricted/Projects Funds

## Primary Purpose Trading

## Other Permitted Trading

# Income & Expenditure Forecast

| ***Description*** | ***Fund*** | ***£, Yr-1*** | ***£, Yr-2*** | ***£, Yr-3*** |
| --- | --- | --- | --- | --- |
| **INCOME** |  |  |  |  |
| **Voluntary Income**  Subscriptions  Donations  Gift Aid  Bequests & Legacies | Gen Gen Gen Gen | £ £ £ £ | £ £ £ £ | £ £ £ £ |
| **Total Voluntary Income** |  | £ | £ | £ |
| **Charitable Activities**  General  Projects  Primary Purpose Trading | Gen Restr Gen | £ £ £ | £ £ £ | £ £ £ |
| **Fundraising**  Permitted Trading  Other income from Fundraising | Gen Gen | *£* £ | *£* £ | *£* £ |
| **Net Income from Fundraising** |  | £ | £ | £ |
| **Trading**  Primary Purpose Trading  Other Permitted Trading | Gen Gen | *£  £* | *£  £* | *£  £* |
| **Net Income from Trading** |  | £ | £ | £ |
| **TOTAL INCOME** |  | **£** | **£** | **£** |
| **EXPENDITURE** |  |  |  |  |
| **Charitable Activities {General}**  Staff costs  Accommodation Costs  Equipment  Consumables **Primary Purpose Trading** | Gen Gen Gen Gen Gen | £ £ £ £ £ | £ £ £ £ £ | £ £ £ £ £ |
| **Total Costs of General Activities** |  | £ | £ | £ |
| **Charitable Activities {Projects}**  Staff costs  Accommodation Costs  Equipment  Consumables | Restr Restr Restr Restr | £ £ £ £ | £ £ £ £ | £ £ ££ |
| **Total Costs of Project Activities** |  | £ | £ | £ |
| **Fundraising**  Permitted Trading  Other Fundraising | Gen Gen | £ £ | £ £ | £ £ |
| **Total Costs of Fundraising** |  | £ | £ | £ |
| **Administration**  Trustees’ Expenses  Staff Costs  Accommodation & Services  Consumables  Sundries  Examination/Audit | Gen Gen Gen  Gen  Gen  Gen | £ £ £ £ £ £ | £ £ £ £ £ £ | £ £ £ £ £ |
| **Total Costs of Administration** |  | £ | £ | £ |
| **TOTAL EXPENDITURE** |  | **£** | **£** | **£** |
| **NET SURPLUS/LOSS ON YEAR** |  | **£** | **£** | **£** |