

Sample Business Plan Template

The business plan may be prepared for an existing or planned volunteer driver service.

1. Name and address of organization.

2. Type and tax status of organization.

3. Mission and purpose of the volunteer driver service.

4. What method(s) are or will be used in providing transportation and what passengers are being or will be served?

5. Describe any similar services already being provided in the area. The specific service(s) provided, area where service(s) are provided, profile of customers served, and the strengths and weaknesses of service(s). List each service separately.

6. How will or does the service complement, supplement, or duplicate similar services already being provided in the area and/or by other organizations? Explain why a clear need exists for existing or proposed service.

7. Estimate the need for the service. (How many people are being or will be served on a weekly/monthly basis during the year? How many trips are being or will be provided for each rider in total?)

8. Describe if the service is or will be a stand-alone service, an added service, or a new menu item to an existing transportation service.

9. Identify other agencies and organizations that are or could be potential partners in delivery of services. Identify what each partnership brings or would bring to the agenda, and how each partnership has been or could be established.

10. Identify required governmental approvals or licenses, and how they have been or will be obtained.

11. Estimate the type and number of vehicles that are or will be needed, how vehicles have been or will be obtained, and acquisition expenses.

12. Estimate staffing requirements for providing existing or new services. (Can jobs of existing staff be enlarged or rearranged, or will there be a need for new staff?)

13. Detail how involving new volunteers has reduced or will reduce staffing expenses. (Attach job description for staff and volunteers.)

14. Attach the organizational design for existing or proposed service. (If design has not been completed, see exercise, *Plan a Volunteer Driver Program*.)

15. Identify or estimate monthly/annual staffing expense. (Identify by position: recruitment, hiring, payroll and related taxes, travel, training, volunteer recognition, health, medical. etc.)

16. Estimate infrastructure requirements for providing existing or new service. (Include monthly office rent, utilities expense, telephone service, office machines and furniture, vehicles and vehicle maintenance, operation expenses, and mileage reimbursement expenses.)

17. Estimate other related administrative expenses for existing or new service. (Include accounting and payroll services, insurance, office supplies, janitorial, etc. If possible, attach vendor quotes.)

18. Formulate a detailed operational plan for providing existing or new service. (Include a flow chart from customer contact through completed transportation service delivery.)

19. Describe how service has been or will be marketed. (Include messages and media to be used.)

20. Estimate marketing expenses for one year.

21. Identify sources of existing funding and steps necessary to secure new funding. (Include sponsors, grants, service fees, fundraising events, charitable donations, etc.)

22. Formulate pro-forma budget for two years of operation. (See template, *Sample Budget Format*.)

23. Identify the principles responsible for implementing the business plan. (These will include, who will do what, when, and how it will be done.)

24. Determine the method for business plan review and refinement, and establish an on-going or start-up meeting schedule.

25. Indicate how the success of the plan and the program is being or will be determined.

BE SURE TO UPDATE YOUR BUSINESS PLAN ON AN ONGOING BASIS!