



Community &  
Voluntary Services  
cheshire east

# Business Planning

## session 4

# Take away task feedback

- What was difficult?
- Any surprises?
- Did you identify new strengths/weaknesses? What are your core competencies?



# Aims and Outcomes

To equip you and your organisation to plan for the future, and understand where your services fit in the wider sector

By the end of this session you should have increased:

- Understanding of how best to consult your market
- Ability to create an operational plan
- Confidence in evaluation methods

# What we'll cover today:

- Market research - consultation
- Operational plan
- Evaluating your planned services



# Market Research and Engagement

## Market research and engagement to discover:

1. Is there a need for the service?
2. How would your beneficiaries like the service to be delivered?

## Before you dive in...

What EXACTLY do you want to find out?

What do you NEED to ask?

# Identifying beneficiaries / a need for your service

Another org  
doing  
similar?

Getting started:  
desktop  
research

A model you  
can replicate or  
adapt?

Possible  
partnership  
opportunity?

Another org  
tried and  
failed?

Gather  
demographic  
information



# Identifying beneficiaries / a need for your service

Own  
experiences/  
perceptions

What are you  
basing this  
need for your  
service on?

Feedback  
from other  
stakeholders

Feedback from  
service  
users/clients

Feedback from general  
public/ communities e.g.  
local Facebook pages

# How do you know your service will be used?

Don't assume that beneficiaries would use your service  
Same model does not necessarily work in multiple locations

So...

Ask!

Focus groups of interested people

Local Facebook groups for feedback: comments/ online survey link

Partner with other organisations: circulate survey links/ host focus groups /reach wider audience etc.

**Online surveys:** survey monkey,  
Microsoft Forms etc

**Interviews:** In-depth 1-2-1  
interviews, possibly with other  
providers/stakeholders as well  
as service users

**Paper-based:** questionnaires in  
designated locations or  
facilitated in person

How to  
engage?

**Focus Groups:** 2 people  
needed, 1 to facilitate and 1 to  
make notes

**Stakeholder events:** specific  
consultation event, piggy-back  
on another appropriate event

Be aware of digital exclusion: not everyone is online or wants to be...

Think about language – don't use acronyms, jargon, clinical terms etc.

# Asking the questions: online surveys

Keep it short and simple: identify KEY questions and stick with them

Don't include anything that is not immediately relevant

Think about your audience – can you use images instead of text?



All the time



A lot of the time



Some of the time



Not at all

# Survey question types: pros and cons

## Closed vs. open questions

- Rule of thumb is mainly closed questions for surveys and open questions for focus groups/interviews
- Open questions in surveys can be useful to flag up wider issues and customer opinions but keep them to an absolute minimum (they are better for small surveys)
- Closed questions are much easier to quantify and analyse and convert into visual representations e.g. charts and graphs

# Survey question types: pros and cons

## Multiple choice / checkboxes

Pros	Cons	Tips
Can choose one or more answer	Limits answers to your suggestions	Have at least 3 different options
Can be easily analysed	Can be time-consuming to create	Include an 'other, please specify option'
Removes subjectivity from answers	Can be frustrating for respondents	Options should all be different and not overlap
		Options need to be phrased simply

Source: Delighted.com blog

# Survey question types: pros and cons

## Text boxes / comment boxes

### Pros:

Can offer viewpoints you hadn't considered

Can widen out your perspective

### Cons:

Can be VERY time-consuming to analyse

# Survey question types: pros and cons

## Scaled questions

These are usually 3, 4, 5 and 7 point scales

Use Likert scales – the hard work of phrasing has already been done for you!

Agreement	Frequency	Quality
Strongly agree	Always	Very good
Agree	Frequently	Good
Undecided	Occasionally	Acceptable
Disagree	Rarely	Poor
Strongly disagree	Never	Very poor



# Survey question types: pros and cons

## Ranking

Can measure strength of feeling and priorities

Can be useful but make sure you've done your homework first to ensure you've got all the relevant options to select from

Test it yourself... Send it to colleagues... Send to friends/family – especially if from the right demographic...

Customise the survey link if possible

Ensure you include:

- Survey background
- How long it will take (can be make or break)
- Contact details
- What the information will be used for
- Next steps

- Ebulletins
- Mailing lists
- Newspaper articles
- Online news websites
- Social media (especially Facebook local groups and specialist interest group pages)
- Events
- Using stakeholder / partner networks

Don't underestimate the power of being visible e.g. market stalls, libraries, busy community venues or standing in a thoroughfare

## Sample sizes: what is a 'viable' size?

Minimum sample size to be 'statistically significant' is 100.

OR

If the entire population size is less than 100, all of the population.

But use common sense and be pragmatic.

NCVO Market Research and Testing:

<https://knowhow.ncvo.org.uk/tools-resources/business-plan-template/writing-your-business-plan/5-market-research-and-testing>

Non-profit market research guide:

<https://www.dnlomnimedia.com/blog/nonprofit-market-research-guide/>

## Information sources

Cheshire East Council Research and Evidence page:

[https://www.cheshireeast.gov.uk/planning/spatial-planning/research\\_and\\_evidence/research\\_and\\_evidence.aspx](https://www.cheshireeast.gov.uk/planning/spatial-planning/research_and_evidence/research_and_evidence.aspx)

Cheshire East Council Joint Strategic Needs Assessment pages (includes a link to the Community JSNA pages with reports about our sector):

[https://www.cheshireeast.gov.uk/council\\_and\\_democracy/council\\_information/jsna/jsna.aspx](https://www.cheshireeast.gov.uk/council_and_democracy/council_information/jsna/jsna.aspx)

NCVO: Designing a questionnaire:

<https://knowhow.ncvo.org.uk/organisation/impact/measuring-your-impact/questionnaires>

Writing Good Survey Questions:

<https://www.youtube.com/watch?v=n34OnLnKzlg>

7 types of customer survey questions:

<https://delighted.com/blog/7-types-customer-survey-questions>

Likert Scale examples for surveys (highly recommended cheat sheet!):

<https://www.extension.iastate.edu/Documents/ANR/LikertScaleExamplesforSurveys.pdf>

Minimising survey bias:

<https://delighted.com/blog/avoid-7-types-sampling-response-survey-bias>

# Break

Back in 5.....



# Aims to Objectives to Outputs

## CES Planning Triangle





# Operational Planning

Objectives

Targets

Staffing

Procedures

Monitoring

# Operational Plan

## Setting KPIs - Be SMART!

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound

# Scenario

The 'Young Knutsfordians' youth club meets in a school hall, in the town centre. It covers the age group 11-16 and meet on a Friday evening. They want to expand and open another day a week for 7-11 year olds, using volunteers and one staff member. They are just at the planning stage of this, but want to get the new session running for September.

# Planning in Action

Aim 1.....													
Delivery area	2020-21 achieved	21-22 target (minimum)	RAG (against target)					Activity	Quarterly milestones				Team / individual Lead
			Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Total		Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	
11-16 youth club	35 young people attending regularly	20% growth - 7 new members	2					Run weekly sessions for young people ages 11-16	Marketing through schools and community venues - for new members	'bring a friend' evening	Christmas party – all welcome	All members included in planning and purchasing new equipment	Volunteers and club leader
		Retain 80% of current members (28)	18						Introduce new games and activities	Event and trip planning with members	Christmas gifts for existing members		
? – not measured	75% attendees increase confidence	70%						Incorporate sessions to learn new skills and develop confidence through performing arts					trustees

# Evaluation - Why Bother?

What is the purpose of monitoring & evaluating?

- Meeting funding targets/ requirements
- Understand stakeholder needs
- Service planning
- Collect evidence for future bids
- Develop reports/ feedback
- Measure impact
- Good Practice

# Performance measures

## Outputs

Are the detailed activities, services and products that or organisation delivers– for example you may have set up a credit union and published a money management guide

## Outcomes

Are the changes, benefits or learning and other effects that actually occur as a result of your activity.

They can be expected or unexpected, positive or negative. I.e members of your credit union and users of your guide are better able to manage money

Impact Assessment – the overall impact of your activity – poverty levels amongst service users is reducing.

# Plan, Do, Review.....



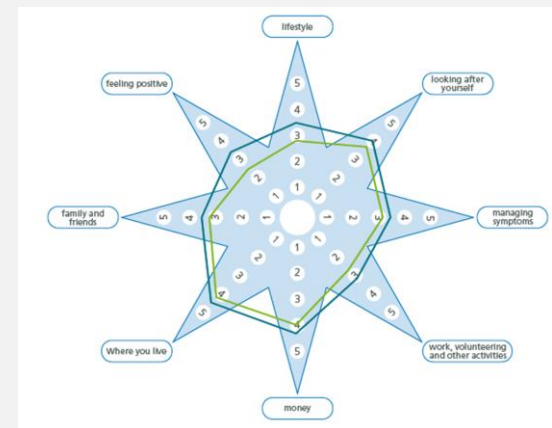
## outcomes monitoring framework

Specific aims	Outcomes	Outcome indicators	Information collection methods	When and by whom	How to report and use
Aim 1					
Aim 2					
Aim 3					



# Monitoring and Evaluation methods

- Sign in sheets
- Photos
- Publications
- Registration forms
- Questionnaires
- Face-to-face interviews
- Focus Groups
- Telephone interviews
- Telephone interviews
- Group interviews
- Case Studies
- Diaries
- Sampling
- Observations



# What is a business plan?

## Component Parts

1. Executive summary
- ✓ 2. About your organisation
- ✓ 3. What we do
- ✓ 4. Our market
- ✓ 5. Market research and testing
6. How we reach our market
- ✓ 7. Market analysis
- ✓ 8. Operational plan
- ✓ 9. People, management and governance
- ✓ 10. Our impact
11. Cost and income structure
12. Financial forecasts
13. Risk map

# Questions

- Take away task
- Future Weeks
- Offers of expertise