Planning for high-impact sustainable GCLN

Investors for Development (I4D) project’s toolkit for strategic and business planning for Global Compact Local Networks
Contents

A. Introduction .............................................................................................................. 3
   - What is the purpose of this toolkit? ........................................................................ 3
   - Why an I4D Planning Toolkit? ............................................................................. 3
   - What is the expected outcome? ............................................................................ 3
   - Why business language? ....................................................................................... 4
   - How to use the toolkit? .......................................................................................... 4
   - FAQ ....................................................................................................................... 5

B. Strategies .................................................................................................................. 6
   - Concept Building – Theory of Change .................................................................... 6

C. Business planning ................................................................................................... 7
   1. Executive summary .............................................................................................. 7
      - 1.1. The network’s vision, mission and values ...................................................... 7
      - 1.2. Theory of Change ......................................................................................... 10
      - 1.3. The network’s present situation ................................................................. 10
      - 1.4. The main objectives and strategies for reaching them ............................... 10
      - 1.5. Partnerships critical for reaching the objectives ......................................... 11
      - 1.6. Financial overview ..................................................................................... 11
      - 1.7. Evaluation .................................................................................................. 11
   2. Situation analysis ................................................................................................. 12
      - 2.1. Market analysis ........................................................................................... 13
         - 2.1.1. CSR market needs ............................................................................... 13
         - 2.1.2. Customers segmentation ...................................................................... 14
      - 2.2. SWOT analysis .......................................................................................... 14
      - 2.3. Competition/Cooperation .......................................................................... 16
         - 2.3.1. Key competitors .................................................................................. 16
      - 2.4. Value offering ............................................................................................ 17
      - 2.5. Critical issues ............................................................................................. 18
   3. Objectives .............................................................................................................. 18
4. Strategies .................................................................................................................. 19
   4.1. Overall strategies .................................................................................................... 19
   4.2. Differentiation\Cooperation .................................................................................... 20
   4.3. Communication strategy ......................................................................................... 21
   4.4. Partnership ............................................................................................................. 21
      4.4.1. Partnership strategy .......................................................................................... 22
      4.4.2. Existing partners and projects ......................................................................... 23
      4.4.3. Prospective partners ....................................................................................... 23

5. Implementation ........................................................................................................... 24
   5.1. Action plan ............................................................................................................. 24
   5.2. Governance and Management structure .................................................................. 24
   5.3. Contingency planning ........................................................................................... 27

6. Finances ....................................................................................................................... 27
   6.1. Budget ..................................................................................................................... 28
   6.2. Funding strategies .................................................................................................. 29
      6.2.1. Membership fees ............................................................................................. 30
      6.2.2. Fund raising ..................................................................................................... 30

7. Evaluation .................................................................................................................... 31

REFERENCES
Planning for high impact, sustainable GCLN
A toolkit for strategic and business planning for Global Compact Local Networks

A. Introduction

What is the purpose of this toolkit?

This toolkit is designed to assist Global Compact Local networks of all sizes and development stages in the planning process - integral part of their transformation into high-impact sustainable organizations. Follow all the steps of the toolkit below to produce a detailed business plan for your network.

The resulting document will provide a solid foundation for sustainability of the network, as well as an effective tool to communicate with members, partners, authorities, potential donors and other stakeholders.

The toolkit also provides practical suggestions on key issues such as governance, funding, value offering, effective partnering, etc.

Why an I4D Planning Toolkit?

Global Compact Local Networks play a very important role in promoting the principles of the Global Compact in their countries through networking, assisting local businesses in implementation of the Principles, Communication on Progress (COP) preparation and policy dialogue facilitation.

Many networks already transformed or are in the process of transforming from an informal gathering of like-minded companies and individuals into an organization with a formalized structure, a governance body and a growing number of members.

Sustainability of such organizations requires a considerable amount of long- and short-term planning.

The main purpose of the I4D Planning Toolkit is to assist the networks in the planning process by providing an easy-to-use summary of the modern planning tools adapted to the specific needs of GCLNs.

What is the expected outcome?

The main goal of this planning toolkit is to help a network to produce plans. More specifically, if all the steps of the toolkit are followed, you will have two documents available:

- Theory of Change (TOC)
- Business Plan

However, the process of the planning is as important, if not more important, than the results. Working with the toolkit will give you more than just two documents; it will also help you with:

- The planning process. The toolkit focuses on the planning process facilitating involvement, team building and creating a shared understanding of problems and opportunities
- Practical tips on critical issues
Why business language?

The business language of the toolkit (as opposed to NGO or development language) is based on the notion that in order to fulfil its purpose, a network should satisfy the needs of its members, deliver value to them, thus the members of the network are its customers, and should be treated accordingly. (The terms customers and members are used interchangeably throughout the toolkit.)

A Global Compact Local Network should see itself as a business in order to expand and thrive, especially taking into account the fact that your main audience is the business community. It will be much easier to advocate the principles of the Global Compact to businessmen while speaking common business language.

How to use the toolkit?

The Investors for Development Project’s (I4D) planning toolkit consists of two main parts: Strategies and Business Planning. Under Strategies you will find resources and guides for using the Theory of Change methodology.

Business Planning is presented as an outline of a finished document. Click on any heading of this outline to read the instruction on how to create the corresponding section of the business plan.

Action! section (visit the web-based version of the toolkit to access this section) is a knowledge sharing tool. Here networks from different countries can present their finished plans and discuss implementation experiences.

Follow the toolkit steps:

• Start from the beginning – Strategies
• Learn about the Theory of Change
• Create your own Theory of Change following the guide in the toolkit
• Proceed to the Contents of a Business plan
• Follow all the steps of the business plan creation.
• Document the results

Modern organizational planning theory is not limited to the tools outlined in the present toolkit; there are many more methods to be used. You can read about some of them here Useful links and documents in the web-based version of the toolkit.

While designing this toolkit we chose the Theory of Change methodology for its focus on social change, compact form, and team-building effectiveness.

The outline of the business plan follows the structure of a typical modern text-book business plan used by millions of small and big companies and organizations in the world. However, It is only a suggestion, not a standard to follow. Modify the content of the plan so it fits your network’s specific situation.
To make our toolkit more user-friendly we used the following pictograms:\(^1\):

- Explains what you should write in the corresponding section of the business plan
- Information/theoretical section, practical tips
- Tools
- Back to the Business Plan outline (if you are viewing the toolkit on your computer)

**FAQ**

**Do we have to write a strategic plan as well?**

Comprehensive organizational planning involves two documents – a long-term strategic plan, where the organisation’s vision, mission, long-term goals and broad strategies are stated, and a short-term business (or operational) plan with focus on the immediate future and the detailed breakdown of activities and resources needed for achieving the plan’s objectives.

Preparing both strategic and business plans is an ideal solution which we strongly recommend. However, with the networks’ lack of resources in mind, we suggest a middle solution - business plan with elements of a strategic plan such as vision, mission and values, summarised in the **Executive summary**.

**What is the difference between TOC and the business plan?**

Theoretically speaking TOC and business plan are two very different methods of planning. A traditional business plan is linear. It analyses the internal and external environments in which an organisation is operating, sets the objectives and then suggests the means by which the objectives will be achieved starting from “now”. Business plans are more short-term oriented.

TOC uses so-called backward mapping. First it formulates the ultimate outcome of the organisation’s existence and than moving backwards, from the desired future to “now”, identifying necessary preconditions for achieving the outcome. TOC is more long-term oriented (or project duration oriented), and thus can be useful for formulating long-term strategies.
B. Strategies

Concept Building – Theory of Change

Theory of Change is a planning methodology used mainly in the non-profit-development world. It is designed for organisations such as GCLNs whose goal is to bring about a certain social change. One of its main advantages is that it uses an approach which is very different from the traditional planning thus giving the organisation a chance to look at the problem literally from a different angle.

With its very short resulting document, focus on the team work and straightforward self-assessment indicators TOC is a perfect method for early stages of a network existence. We encourage networks to use this methodology for identifying the ultimate outcomes, crystallising the concept of the network and forming general strategies. Please find the links to TOC resources and guides below:

Theory of Change resources

The Community Builder’s Approach to Theory of Change
A very useful guide for facilitators. Written by Andrea A. Anderson, Ph.D. for The Aspen Institute Roundtable on Community Change.

http://www.theoryofchange.org

A comprehensive resource by ActKnowledge for those who want to require deeper knowledge of TOC.

I4D TOC
Here you can find TOC example which was created by the I4D team.

Advantages of using TOC Methodology:

➢ It focuses on the most meaningful results, leaving details to business plans
➢ It helps to understand network’s own work in relation to its surrounding environment and stakeholders
➢ Outstanding visual clarity of TOC helps seeing the big picture
➢ It encourages collective problem solving, learning, innovation
➢ It helps creating a shared vision of the long term change

TOC practical tips

➢ Important note: TOC creation is strongly dependent on the skills of a facilitator. Find a professional facilitator to help conducting TOC brainstorming sessions
➢ While TOC offers a very effective planning tool, due of its general character it cannot replace a detailed business plan. But it can become a very good basis for the business plan creation. Long-term outcomes can be translated into short-term Objectives
➢ Interventions from your TOC are a very good basis for Strategies of the business plan. Indicators can be used in the Evaluation
C. Business planning

1. Executive summary

In maximum two pages, provide a summary of the plan, ensuring that a reader could quickly understand the key elements of your network’s set-up and the scope of its activities. It is better to finalize this section upon the completion of all other business plan elements. In this section you should briefly outline the following:

1.1. The network’s vision, mission and core values
1.2. Theory of Change (if applicable)
1.3. The network’s present situation
1.4. Your main objectives and the strategies for reaching them
1.5. Partnerships critical for reaching the objectives
1.6. Financial overview
1.7. Evaluation

1.1. The network’s vision, mission and values

Nothing can organize people in a purposeful action better and give them clearer sense of direction than a meaningful and inspirational mission statement, well grounded in the organisation’s vision. Having a sense of direction and being purpose driven is even more important for an organization striving to make its country a place where human rights are respected, labour conditions are just, the environment is clean and corruption is a thing of the past.

By becoming a Global Compact Local Network you commit to this very challenging vision, which is probably unachievable in one human lifetime. Make things happen here and now by creating, sharing and living up to the vision, mission and values statements.

What are mission and vision statements?

Put simply, vision is a guiding star for the organisation and a mission statement is a compass with which it can check the path. A vision of an organisation is a concise picture of the organisation at some future time, which sets the overall direction of the organisation. It is what the organisation strives to be.

A vision is something to be pursued, while a mission is something to be accomplished. A mission is a statement that specifies an organisation’s purpose or “reason for being.” It is the primary objective toward which the organisation’s plans and programs should be aimed.
## Writing a vision statement

| 1. Create a vision writing group | Identify core group of members (number of people depends on the stage of your network’s development) who in your opinion are best suited for the task – they share the passion for CSR but at the same time understand the realities of life
<table>
<thead>
<tr>
<th></th>
<th>In later stages, when the network is more established a steering committee or an assembly will become the vision building group</th>
</tr>
</thead>
</table>
| 2. Set up a meeting | In the beginning of the meeting explain the purpose, the expected outcome and the criteria for a vision statement
| | A vision statement should be:
| | ✓ Future-oriented, reaching at least 10 years in the future
| | ✓ Idealistic – picturing the most optimistic desired future for your network
| | ✓ Global Compact oriented. GCLN is a part of Global Compact initiative and should strive to implement the GC vision
| | ✓ Ambitious
| | ✓ Inspirational
| | ✓ Reflecting the core values of the network’s members
| | ✓ Short, powerful and emotional phrase |
| 3. Conduct a brainstorming session | A vision statement should answer the following questions:
| | ✓ If all our dreams come true what would our organization be like?
| | ✓ What will our success look like in our country?
| | ✓ Where will the network be in 10 years? Be very optimistic |
| | Assign a member of the group to write down all the suggestions
| | Let every member of the group finish the sentence “Our vision statement is…”
| | Discuss and choose the best suggestion |
| 4. Write a first draft of a vision statement | Does it satisfy the above criteria? Change if necessary.
## Writing a mission statement

<table>
<thead>
<tr>
<th>Step</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Gather a mission writing group</td>
<td><em>(see writing a vision statement)</em></td>
</tr>
</tbody>
</table>
| 2. Set up a meeting                       | - In the beginning of the meeting explain the purpose and the expected outcome and the criteria for a mission statement.  
  - A mission statement: 
    ✓ Is short and sharply focused  
    ✓ Is clear and easily understood  
    ✓ Defines why do we do what we do, why the organization exists  
    ✓ Is sufficiently broad  
    ✓ Provides direction for doing the right things  
    ✓ Addresses our opportunities  
    ✓ Matches our competence  
    ✓ Inspires our commitment  
    ✓ Says, what in the end we want to be remembered for  
    ✓ Provides a basis for planning and setting objectives  
    ✓ Grounded in the vision statement |
| 3. Conduct a brainstorming session        | - A mission statement should answer the following questions (by Peter Drucker):  
  ✓ What is our business?  
  ✓ Who is the customer (Who must be satisfied for the organisation to achieve results?)  
  ✓ What is of value to the customer?  
  ✓ What will our business be?  
  ✓ What should our business be?  

  - Another powerful tool for creating a mission statement is to ask a single question (by Jack Welch):  
    ✓ How do we intend to win in this business?  

  - Assign a member of the group to write down all the suggestions  
  - Let every member of the group finish the sentence “Our mission statement is…”  
  - Discuss and choose the best suggestion |
| 4. Write a first draft                    | Does it satisfy the above criteria? Change if necessary. |
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Identifying core values

1. Establish a writing group
   - see writing a mission statement

2. Set up a meeting
   - In the beginning of the meeting explain the purpose and the expected outcome and the criteria for core values statement.

3. Conduct a brainstorming session
   - Answer the following questions:
     ✓ What would you tell your children are the core values you have at work and you hope they will hold when they grow up?
     ✓ If you had enough money to retire why would you still go to work?
     ✓ Can you see the core values being strong even 100 years from now?
   - Does it satisfy the above criteria? Change if necessary.

4. Write a first draft
   - Finalizing vision, mission and values statements

1. Write the final version
   - Get approval by the steering committee

2. Share the resulting document
   - Post it on your website
   - Include it in your promotional materials (brochures, flyers)
   - Insert it in the Executive summary of the business plan

1.2. Theory of Change

In case you created a TOC for your network, insert the “Pathway of Change” page into the Executive summary of the business plan. Attach the rest of the TOC as an annex to the business plan.

How to create a Theory of Change

1.3. The network’s present situation

Summarise the contents of the Situation analysis highlighting the most important information about the position of the network on the CSR market. Briefly describe customers’ needs, SWOT results, competition and the network’s value proposition.

1.4. The main objectives and strategies for reaching them

Provide a summary of the Objectives and describe the Strategies you devised for reaching them.
1.5. Partnerships critical for reaching the objectives

Summarise the contents of the Partnership section of the business plan. List the partnership projects, which are crucial for reaching the network’s objectives.

1.6. Financial overview

Provide the most important details about your planned expenses and the sources of income.

1.7. Evaluation

Describe how the network is going to control the implementation of the business plan based on the Evaluation section
2. Situation analysis

In this section you should analyse your network and the environment in which it operates. A reader should have a clear picture of the network’s position on the CSR market as well as who the network’s customers are, what their needs are and how the network is planning to satisfy them. This section includes the following paragraphs:

2.1. Market analysis
  2.1.1. CSR market needs
  2.1.2. Customers segmentation
2.2. SWOT analysis
2.3. Competition/Cooperation
  2.3.1. Key competitors
2.4. Value offering
2.5. Critical issues

CSR attracts more and more companies around the world. The reasons are different: (branding, value chain or investors’ pressure, government requirements, entering new export markets etc.) but the fact remains the same – demand for CSR knowledge and practices increases, which results in an increasing number of organisations offering CSR consultancy services in the region.

At the same time many international initiatives are promoting CSR as well. As long as CSR issues are adequately addressed it is not very important what CSR model a company is going to adopt and which consultancy agency it would use. In the end they all promote similar principles and help moving towards the same goals.

However, inevitable market reality is that your GCLN is going to compete (or already competes) with a number of initiatives and consultancies. How would your network survive in this highly competitive environment? Why would a company, small or big, choose your network?

The answer is – you have to deliver value to them! You have to treat them as your customers. You need to understand their needs in order to build long and mutually satisfying relationships with them.

If you followed the guide in the previous chapter Writing a mission statement you already identified your customers in general, as a large group. You have also been networking and met some potential core group members, so you already have an idea about who should be satisfied in order for your network to achieve results. Now you have to look more closely at your prospective customers to understand who they are and what they need.

A note: Global Compact Local Networks should be business led. But the inclusive, multi-stakeholder principle implies inclusion of NGOs, academia, media, trade unions, government bodies etc. into a network. Theoretically speaking they are all customers of the network – they all should be satisfied in order to fulfill the network’s mission. However, since your main target group is the business community, this toolkit will address the issues connected to these stakeholders in the Partnership section.
2.1. Market analysis

This section should specify the current CSR/Global Compact related needs of your prospective and existing customers. Special focus should be put on the needs which are currently not satisfied and addressing which will help the network to reach its goals. Ideally, this section should be based on interviews with potential members and on feedback from the existing members of the network.

2.1.1. CSR market needs

**Identifying market needs.**

| 1. Gather your planning group | Explain the purpose, the expected outcome and the criteria for a list of market needs
|                            | • A list of market needs should be:
|                            | ✓ As specific as possible
|                            | ✓ Focused on identifying unmet needs |
| 2. Conduct a brainstorming session | Write a list of market needs answering the following questions:
|                            | ✓ What are the most common problems faced by the business community in relation to CSR/Global Compact?
|                            | ✓ What assistance do companies need in order to implement CSR/GC principles?
|                            | ✓ What CSR related needs do your customers’ customers have?
|                            | ✓ What would make existing members of the network continue being active (i.e. continue implementing GC principles, communicating progress)?
|                            | ✓ What would attract new members? |
| 3. Discuss your list with your existing and potential members and make changes | |
| 4. Finalise the list | |
2.1.2 Customers segmentation

**Customer segmentation tool**

<table>
<thead>
<tr>
<th>Target segments</th>
<th>Size</th>
<th>Value</th>
<th>Challenge/Opportunity</th>
<th>Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Segment A</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Segment B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Segment C</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Identify key customer segments. Each segment should share similar attributes (industry, needs, size, etc.). Classify which segment is primary or secondary.

- Estimate the size of each segment in terms of turnover, number of employees, etc.
- Explain key needs of each segment and how it can be satisfied by your network. What is your value to them?
- What is the unique challenge and opportunity to each segment? How do you overcome or capitalize on them?
- Provide evidence that clearly validates why there is a real need in this segment and/or that this segment is interested in your or a similar social product/service.

**Practical Tips: Adopt profiling criteria**

Your network is facing a challenge – in order to expand it needs to gain momentum, to attract attention of as many companies as you possibly can; at the same time only companies, which take their commitment to the Global Compact initiative and their membership in the GCLN seriously, are going to make your organisation respected and competitive. In order to resolve this dilemma and avoid bluewashing you should adopt profiling criteria for prospective customers.

Here are some suggestions for profiling criteria (develop your own criteria, which reflect your market environment):

A prospective customer should be

- Competent
- Properly represented
- Willing to communicate
- Ready to incorporate CSR/GC principles into the company’s activities

**2.2 SWOT analysis**

An overall evaluation of the network’s external environment (opportunities and threats) and internal environment (strengths and weaknesses) should be made in this section.
To be effective a SWOT analysis should be:

- Specific (especially in its focus on the network’s area of influence)
- Short
- Using verified data
- Weighed (prioritised)
- Realistic (although it should consider the network’s ability to change)

**Option Generation - TOWS grid**

A useful tool: a TOWS grid helps to convert information gathered during SWOT analysis into meaningful strategies and actions by logically grouping strengths, weaknesses, opportunities and threats. Later, consider inserting the resulting strategies into the Strategies section of the business plan. An example of a TOWS grid:

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>o Strong institutional &amp; legal framework</td>
<td></td>
</tr>
<tr>
<td>o Large companies</td>
<td></td>
</tr>
<tr>
<td>o Financially strong</td>
<td></td>
</tr>
<tr>
<td>o Secretariat, Office infrastructure</td>
<td></td>
</tr>
<tr>
<td>o Few other stakeholders</td>
<td></td>
</tr>
<tr>
<td>o Small membership base</td>
<td></td>
</tr>
<tr>
<td>o Little public recognition of GC brand</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>What options are apparent when putting together strengths and opportunities?</th>
<th>What options are apparent when putting together weaknesses and opportunities?</th>
</tr>
</thead>
<tbody>
<tr>
<td>o Large corporate base</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Numerous Small &amp; Medium companies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Strong CSO/NGO base</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Growing CSR consciousness</td>
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<td></td>
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<tr>
<td>Use existing large companies as leverage to engage more large companies</td>
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<td></td>
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<tr>
<td>Concentrate human and financial resources on a communication program directed towards SMEs</td>
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<td></td>
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<tr>
<td>Engage NGOs in strengthening GC brand</td>
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<td></td>
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<tr>
<td>Expand membership base through focusing on SMEs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diversify stakeholder mix by approaching CSOs/NGOs</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Threats</th>
<th>What options are apparent when putting together strengths and threats?</th>
<th>What options are apparent when putting together weaknesses and threats?</th>
</tr>
</thead>
<tbody>
<tr>
<td>o Too many agencies involved in promoting CSR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Companies lose interest</td>
<td></td>
<td></td>
</tr>
<tr>
<td>With help of strong organizational framework, create more value for members</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The network can bring its own and members’ status, as well as its strong organization to partnership projects with other organizations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>It is vital for the network to start strengthening its own brand</td>
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</tr>
</tbody>
</table>
2.3. Competition/Cooperation

Provide information on which organisations/initiatives/companies are competing with your network.

2.3.1. Key competitors

**Competitors’ identification**

<table>
<thead>
<tr>
<th>Name of organisation</th>
<th>Type of organisation</th>
<th>Areas in which it competes with GCLN</th>
<th>Areas in which it can cooperate with GCLN</th>
</tr>
</thead>
<tbody>
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</table>

Which organizations/initiatives/companies are providing CSR related membership/services? What organization would a business, interested in CSR issues, contact first?

Consultancy, NGO, governmental organisation, etc.

Do the network’s competitors offer services/value which your network does not provide? In which areas does GCLN compete with these organizations?

In which areas can the network cooperate with these organizations?

**Practical Tips: Where to find information about prospective members, competitors, partners**

Building a database of prospective members (as well as potential partners and donors) requires time consuming search for information on their main activities, size, contacts, financial situation, etc. Use available Internet databases to make your search more effective. Here are some examples of such databases:

- Dun&Bradstreet ([www.dnb.com](http://www.dnb.com))
- Kompass ([www.kompass.com](http://www.kompass.com))
- Orbis ([https://orbis.bvdep.com](https://orbis.bvdep.com))
- Reuters ([www.reuters.com](http://www.reuters.com))

Consider using similar business databases in your country. Most of the resources providing high quality information are subscription-based. Consider engaging local providers of business information in the GCLN activities.

Your existing members may also have extensive knowledge of the business community. Is there a possibility to use their knowledge for the purpose of spreading the Global Compact principles and expanding your network?
2.4. Value offering

Write a list of value creating activities. Use the results from Identifying market needs and Customer segmentation tool.

Formulating value offering

Use the following questions to write a list of value creating activities:

- What services/products can the network provide in order to satisfy the needs of its customers?
- Which activity would improve our customers' competitiveness?
- What activity would help our customers to continue being active members?
- Which activity would attract prospective new members?
- Which activity would encourage companies in implementing CSR/GC principles?
- What would our customers gain as a result of these activities?
- Will our customers' customers gain from such activities?

Examples of value creating activities

Based on the results of surveys, conducted by I4D among GCLN members in different countries and the experience of the other GCLNs, the following list presents value creating activities divided into five areas, i.e. networking, facilitation, knowledge broker, publicity, assistance in COP preparation.

Networking

- Providing a platform for experience sharing for companies
- Organising regular meetings (monthly, quarterly, yearly)

Facilitation, mediation

- Providing match-making services (help businesses build partnerships, programmes with the UN, governments, NGOs, etc.)
- Providing a link to government
- Being a collective voice for the private sector on different important issues
- Being a policy dialogue facilitator – bringing together businesses, government, policy makers to promote a good regulatory environment for responsible business behaviour
- Initiating stakeholder dialogue. Helping creating a constructive dialogue between businesses, government, NGOs in dealing with CSR challenges that arise in connection with cross national investment projects and business operations

Knowledge broker

- Organising seminars and conferences on GC and CSR
- Conducting mini-surveys of a member company in order to determine its CSR situation
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A toolkit for strategic and business planning for Global Compact Local Networks

• Helping to choose an appropriate CSR toolkit
• Spreading best practice cases
• Providing localised learning materials
• Facilitating training
• Recommending appropriate CSR consulting services
• Providing own CSR consultancy services (when the network is mature)

Publicity

• Managing the network’s marketing activities
• Managing the relations with media
• Facilitating business champions’ endorsements
• Delivering CSR awards (in the long term prospective)

Assistance in COP preparation

• Providing assistance in COP preparation (directly or via recommended consultancy) as one of the most valuable services a GCLN can provide for a member company

2.5 Critical issues

State the critical issues that your network will be facing during the planning period.

Identifying critical issues

Considering all the information you have gathered in the previous sections, continue the following statement:

Our network will not fulfill its mission this (planning period) if we do not…

• example: insure that 100% of our existing members submit quality COPs
• example: create a functioning secretariat with clearly defined responsibilities

3. Objectives

This section should state the network’s short-term objectives. Formulate them according to your Situation Analysis.

Objectives should be:

• Arranged hierarchically
• SMART – specific, measurable, ambitious, realistic, time-based
• Consistent – objectives should not be contradicting each other or your network’s vision, mission and values
Objectives validation tool

Use the following tool to validate your objectives:

<table>
<thead>
<tr>
<th>Objective</th>
<th>Specific</th>
<th>Measurable</th>
<th>Ambitious</th>
<th>Realistic</th>
<th>Time-based</th>
</tr>
</thead>
</table>
| Objective 1.  
To organize outreach events for promotion of the Global Compact principles | No | No | No | Yes | No |
| Objective 1. (Modified)  
To organize 2 seminars on implementation of the GC principles for the networks existing and potential members during 2010 with at least 50 companies attending | Yes | Yes | Yes | Yes | Yes |
| Objective 2.  
To recruit 30 new members to the network | No | Yes | Yes | Yes | No |
| Objective 2. (Modified)  
To recruit 20 SMEs (target list attached) to the network during 2010, and to recruit 10 MNCs (target list attached) to the network in 2010 | Yes | Yes | Yes | Yes | Yes |

4. Strategies

Describe your strategies here. At this point you have already analyzed your network’s present situation, formulated your value offering and identified the main objectives. This section should describe how you are going to deliver value to your customers in order to meet the objectives of the plan.

4.1. Overall strategies

If you followed all the steps of this guide you already have two sources which could be used for the strategy formulation: Interventions from the Theory of Change and results of the TOWS analysis. You can also formulate your strategies according to your objectives and market needs.

Use the following tool to formulate your strategies according to the Objectives:
Strategy formulation according to the objectives

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Proposed strategies to meet the objectives</th>
<th>Reasoning/Assumption behind the strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>List your plan’s objectives in hierarchical order starting from the most important</td>
<td>Formulate a strategy (or strategies) for each objective. Remember to concentrate on the most crucial strategies. Too many strategies will distract you from the most important issues.</td>
<td>Why will this particular strategy be effective?</td>
</tr>
</tbody>
</table>

4.2. Differentiation/Cooperation

Indicate here, how your network will differentiate itself from the competitors identified in the section 2.3. This section should also elaborate on the possible ways of cooperation with other CSR organizations/initiatives in order to achieve the plan’s objectives.

Use the following tool to formulate your differentiation/cooperation strategies:

Formulating differentiation/cooperation strategy

<table>
<thead>
<tr>
<th>Competitors/ their services and value offering</th>
<th>Type</th>
<th>Differentiation/Cooperation strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify key competitors providing similar, substitutable or complementing products/services.</td>
<td>Classify type of competitors; direct, substitution, or complimentary.</td>
<td>Explain why your value offering - 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 network?</td>
</tr>
</tbody>
</table>
4.3. Communication strategy

Communication strategy is the “voice” of your network. Decide how you want to inform your stakeholders (present and future members, partners, general public, investors, labor organizations, government, NGOs) about the network, the Global Compact principles, the benefits of being a member, etc.

Every contact a company or an individual has with your network (by attending a seminar you organized, reading the network’s brochure, meeting your representative or visiting your website) has a potential to improve or to weaken the network’s image.

Therefore you should have a common communication strategy for the network and a dedicated person responsible for the implementation of the communication strategy.

Use the following tool to design your communication strategy:

Formulating communication strategy

<table>
<thead>
<tr>
<th>Target audience</th>
<th>Communication objectives</th>
<th>Communication strategy</th>
<th>Communication channels</th>
</tr>
</thead>
</table>
| SMEs - prospective members | To boost the network’s attractiveness to SMEs | Message: we know SMEs needs better than anyone. We offer immediate practical help on CSR/GC implementation | • Seminar: Implementation of GC principles for SMEs  
• Network’s webpage includes “SMEs welcome here” block with tips, CSR tools, COP assistance and contact details tailored to the SME needs |

Identify target audience: existing members, potential members, general public, donors, government, etc.

Determine communication objectives. For example: increase network’s brand recognition, increase awareness on a specific value offering

How do you want your target groups to perceive your network and the value offering? Craft messages for each of the target groups.

Choose communication channels:

- Advertising (brochures, flyers, print ads)
- Events
- Business cases
- PR/Publicity (Press releases, annual reports, publications)
- Direct marketing (email, phone calls)
- Business champions, etc.

4.4. Partnership

Fulfilling the objectives of the plan might demand extra resources. Effective partnering with different organizations will help you to bring the extra resources from the outside and utilize them effectively. Formulate your partnership strategy and write a list of your existing and prospective partners in this section.
4.4.1. Partnership strategy

Three core principles proved to be the most important in successful partnering:

- **Equity** – even partners with very unequal financial and public profiles should have equal opportunities and rights in the partnership
- **Transparency** – honest and open working relationships are essential for building trust between partners
- **Mutual benefit** – all sides of the partnership should benefit from it

Building each successful partnership is a very unique process; it cannot be repeated or dictated. The following steps of the partnering process are simply suggestions. They might, however, help you to approach partnering more systematically and avoid common pitfalls.

### Step-by-step guide to partnering

#### 1. Scoping

Use the following tool to identify and evaluate your potential partners:

#### Identifying and evaluating potential partners

<table>
<thead>
<tr>
<th>Value creating activities</th>
<th>Extra resources needed</th>
<th>Organisations in possession of such resources</th>
<th>Desired profile</th>
<th>Potential gains for the partner</th>
<th>Potential risks</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value creating activity 1</td>
<td>Resource 1</td>
<td>Organisation 1</td>
<td>Criteria a: Yes</td>
<td>Gain 1</td>
<td>No risks</td>
<td>Potential partner</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Criteria b: No</td>
<td>Gain 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Criteria c: Yes</td>
<td>Gain 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Criteria d: Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Examine the list of the network’s value creating activities. Which of them need extra resources? Write a list.
2. Building relationship
   • Agree on the goals and core principles of the future partnership

3. Resource mapping
   • Consider what resources will be needed from both sides in order to make the agreed project work.
   • Organise a meeting with your potential partner and discuss each partner’s possible contribution in details

4. Securing partner commitment.
   • Ideally, each partnership should grow from a simple dialogue to some considerable commitment to collaboration. Such commitment is typically formalised in a Memorandum of Understanding or Partnering Agreement. Usually, in the beginning when the scale of cooperation is small, such formalisation is not legally binding. Larger projects, especially those involving funding, are better supported by a legally binding contract.

5. Planning
   • Identify who will be responsible for the partnership projects from both sides
   • Set specific, measurable, achievable, realistic, timed objectives
   • Write an outline of an action plan
   • Discuss and finalise the action plan with the partner organisation

6. Partnership assessment
   • Monitor progress periodically
   • Organise meetings with the partner to discuss fulfilment of the objectives

4.4.2 Existing partners and projects
   • Describe existing partners and projects/ value creating activities in which they are involved.

4.4.3 Prospective partners
   • Write a list of organizations with which your network is planning to partner based on the Identifying and evaluating potential partners tool
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5. Implementation

In this section you should list actions which will lead you to achieving the objectives of the business plan. You should also summarize your governance and management structure and provide an organizational chart of your network.

5.1. Action plan

Write an action plan based on the Objectives and Strategies identified earlier. Specify the timeline and a responsible person (or a team for each task).

Action plan

<table>
<thead>
<tr>
<th>Objective</th>
<th>Action</th>
<th>Time</th>
<th>Responsible</th>
<th>Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>State the objectives of the business plan</td>
<td>Explain in detail what actions are needed in order to achieve the objectives</td>
<td>Indicate the timeline for actions</td>
<td>Name of the person or a working group/task force responsible for the action</td>
<td>Create indicators for measuring the success of the activity</td>
</tr>
</tbody>
</table>

5.2. Governance and management structure

GCLN’s experience shows that a good governance structure is essential to achieving the network’s goals and vital to its long term sustainability. Basically, a network cannot be effective and deliver value to its members without a formalized governing structure.

Nevertheless, the main task of the guide is not to impose a standard governance structure on your network; it is to show that a good governance structure should be well-thought-out, and documented.

It is understood that it would be difficult for an emerging network to create and maintain a full-scale governance structure. It should, however, follow the minimum governance requirements, in order to qualify as a Global Compact Local Network.

For networks with an increasing number of participants and stakeholders a more defined governance system will be necessary to manage growth in ways that improve accountability and impact. Furthermore, depending on a country’s laws, further registering of the network as a legal entity could require a formalized governance structure as well.

The example of a governance model presented in the following guide is based on the experience of established GCLNs in different countries. It is important to mention, however, that there is no one-size-fits-all model, and that you should find a governance approach which would be best for achieving your network’s mission in your own country.
Step-by-step guide to creating a governance and management mechanism

The main task of this guide is to help a Global Compact Local Network to choose what governing bodies it will have and how they will interact, to assign responsibilities and powers to them as well as to make sure that the whole governance mechanism runs according to a set of rules (also called bylaws). The following steps will walk you through the process of creating a governance structure similar to the following example:

1. Devise a governance structure (see example – Figure 1)

Network Assembly – gathering of all members of the network. It typically has the following functions:

- Gathering (at least once a year)
- Making decisions on most important issues of the network
- Electing members of the Steering Committee

Steering committee – elected by the Network Assembly, it should consist of the network members, representing all categories of stakeholders. Balanced representation could be suggested to insure that the network is business-led but inclusive (for example bylaws could specify that 70% of the Steering Committee members must be business representatives and 30% must come from NGOs, government, trade unions, etc.). The steering committee has the following functions:

- Writing the vision and mission statements
- Ensuring that the network is following its mission
- Electing chairperson
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- Electing a person authorised to act on behalf of the Local Network at the Annual Local Networks Forum and in the management of the network’s logo
- Meeting periodically
- Formulating budget
- Recruiting new members
- Promoting Global Compact principles in the country
- Overseeing secretariat
- Overseeing working groups and task forces

**Secretariat** – management team. Small team of specialists, working full- or part-time can be led by GCLN focal point. The secretariat can be provided by the company which chairs the Steering Committee, by other member companies or NGOs, or hired externally. Secretariat ensures smooth day-to-day operations of the network. The secretariat can be managed by a CEO, who is appointed by the Steering Committee.

**Working groups** - small teams of professionals with relevant skills from member companies working on special areas of the network’s core activities, such as membership, funding, communications, CoPs, training, etc. Working groups could be also devoted to issue areas, such as human rights or environment, as well as to industry sectors – textile, financial, etc.

**Task forces** - small teams of professionals from member companies, set up for specific time, for a specific project or a problem. Task forces disband after the task is complete.

2. **Write bylaws** – write a set of rules for all the elements of the governing structure. Bylaws typically include:

- Names of governing bodies and their relationship (they can be different from the names used in Figure 1. For example, Steering committee can be called Governing Board, Advisory Board, etc.)
- Frequency and a minimum number of members present to make decisions (quorum) for meetings
- Number and terms of Steering Committee members
- Criteria and mechanism for Steering Committee members nomination and election (criteria might include: expertise, commitment, diversity)
- Scope of authority, responsibilities and powers of the Steering Committee members
- Membership issues (definition of a GCLN member, eligibility, expulsion, etc.)
- Minimum number of Steering Committee meetings per year
- Decision making and conflict resolving procedures
- Membership and authority of working groups
- Record keeping
- Financial responsibilities
- Amendment procedures

3. **Present the governing model to the Network Assembly**

4. **Gather suggestions from the members, make necessary changes and get the structure approved by the Network Assembly**
5.3. Contingency planning

Write a list of possible difficulties and risks, which may prevent the network from achieving the objectives of the business plan.

### Contingency planning

<table>
<thead>
<tr>
<th>Potential difficulties and risks</th>
<th>Impact assessment</th>
<th>Probability rating</th>
<th>Reaction plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summarize potential risks and difficulties which may prevent the network from achieving the objectives</td>
<td>What impact these unwanted events would have on the network</td>
<td>Decide on a scale (for example 1-10) and rate the probability of all the risks</td>
<td>What actions should be taken to minimize or eliminate the impact of the unwanted events?</td>
</tr>
</tbody>
</table>

6. Finances

This section should summarize the most important documents of your financial management such as annual budget or cash flow forecast as well as your funding strategies. A reader should be able to understand how much money your network plans to raise and spend for achieving the objectives of the business plan over the planning period.

**Why is financial management important for GCLNs?**

In many NGOs and other civil society organizations financial management has a rather low priority. Finances are often poorly planned and monitored. In the rapidly changing and competitive world an organization with insufficient financial management faces serious sustainability challenges.

**Good practice in financial management will:**

- help you to make effective and efficient use of resources to achieve objectives and fulfill commitments to stakeholders
- help you to be more accountable to your members, donors and other stakeholders
- give you the advantage in competition for increasingly scarce resources
- help you prepare your network for long-term financial sustainability
To ensure the effectiveness of your network’s financial management you should have a clear picture of:

- The legal status of your network. Is it registered as an NGO or a charity organization? What legal liabilities apply to it? Consult a legal adviser in your country on these matters.
- What governance system do you have? Who in the governing body (Board of Directors, Steering Committee) is overseeing the finances?
- Who is responsible for finances on the managerial level (within the Secretariat, for example)? A typical structure of financial management consists of a treasurer who oversees the finances of the organization, a finance manager and a finance team:

In smaller organizations, however, it is often the Treasurer who takes on a more active role and acts as a Finance Manager and a bookkeeper.

6.1. Budget

Place your annual budget here. (Preparing a multiannual budget is strongly recommended since it can help securing long-term donor commitment)

In order to prepare a meaningful budget you should answer the following questions:

- What are the objectives of the plan? (revisit the Objectives you already formulated)
- What activities are planned for achieving the objectives? (check your Action plan)
- What resources will be needed to perform these activities?
- How much will these resources cost?
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- Where will the funding come from?
- Is the resulting budget realistic?

For detailed instructions on budgeting we recommend to download Mango’s guide on Practical Financial Management for NGOs

Sample budget worksheet

<table>
<thead>
<tr>
<th>Ref.</th>
<th>Description</th>
<th>Unit</th>
<th>Unit cost</th>
<th>Quantity</th>
<th>Total cost</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Staff Costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A1</td>
<td>CEO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A2</td>
<td>Programme Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>Administration costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B1</td>
<td>Stationary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B2</td>
<td>Internet</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B3</td>
<td>Phone/Fax</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B4</td>
<td>Office rent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B5</td>
<td>Electricity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B6</td>
<td>Books, manuals, publications</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>Capital costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C1</td>
<td>Computer hardware</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C2</td>
<td>Office furniture/equipment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C3</td>
<td>Car</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>Transport</td>
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</tr>
<tr>
<td>E</td>
<td>Travel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>Event organisation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G</td>
<td>Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Contingency</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6.2. Funding strategies

This section of the plan should show how the network is going to finance its activities during the planning period. List all your funding sources (donors, membership fees, network’s own consultancy services, etc.) and compare them to the network’s expenses.

Cost saving tips:

- Office rent – check with your member companies. Is there a possibility that your network can rent a space in their office free of charge (and possibly use their telephone/internet connections)?
- Staff salaries – can your member companies donate their specialists’ time to the network’s secretariat?
- Use internet telephony (Skype, JustVoip) to minimize your telephone bills
- Use video conferences (Skype, www.sightspeed.com, etc.) to minimize travel costs
6.2.1 Membership fees

If you decided to establish a membership fee in your network, clarify here how much you members are going to pay according to their size, country of origin, etc.

**Membership fees structure**

<table>
<thead>
<tr>
<th>Membership Type</th>
<th>Entrance fee</th>
<th>Annual fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>MNCs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Large companies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMEs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NGOs, SCOs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Network membership tips:**

- More actively engaged members (members seeing value in GCLN membership) are more willing to support network financially
- Personal contact with companies top management is very important; sending emails with information and funding requests is not effective

6.2.2 Fundraising

Prepare a “funding grid” – consider where funds will come from in order to pay for each part of your budget. Update the grid regularly. It will help you to formulate your funding needs and communicate them to the donors.

**Example funding grid**

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Total budget</th>
<th>Donor 1</th>
<th>Donor 2</th>
<th>Membership fees</th>
<th>Consultancy services</th>
<th>Other</th>
<th>Sub Total</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admin.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capital</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transport</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 7. Evaluation

Specify in this section how you are going to measure the success of the business plan implementation, who is going to be responsible for the monitoring and how frequent the monitoring should be conducted.

The success of the business plan is vitally dependent on constant control and self-assessment. If you followed all the instructions of the toolkit, you already created indicators for measuring the success of the implementation:

- If you started your planning process from creating a Theory of Change for your network you already have a set of indicators, which should be monitored and measured.
- You assigned indicators for each of the objectives in the Identifying Objectives tool.

#### Evaluation

Fill in the control column in the Action plan tool:

<table>
<thead>
<tr>
<th>Objective</th>
<th>Action</th>
<th>Time</th>
<th>Responsible</th>
<th>Indicator</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>State the objectives of the business plan</td>
<td>Explain in details what actions are needed for achieving the objectives</td>
<td>Indicate the timeline for actions</td>
<td>Name of the person or a working group/task force responsible for the action</td>
<td>Create a indicator for measuring the success of the activity</td>
<td>Who and when monitors the indicator? How much should the indicator change in order for the objective to qualify as successfully fulfilled?</td>
</tr>
</tbody>
</table>
REFERENCES

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8 Based on GCS India SWOT, presented at GCLNs meeting in Seoul,2008
9 Ros Tennyson, The Partnering toolbook. The International Business Leaders Forum (IBLF) and the Global Alliance for Improved Nutrition (GAIN), 2003
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