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Social Enterprise Development Plan

Template

Use this template to help your team think through the process of developing your social enterprise.

Name of your potential social enterprise:

Description (1 sentence) of the enterprise:

Complete the table below, indicating who you think should be on your social enterprise planning team and their anticipated role(s). The Roles in column 1 are recommendations, but need not remain.

Role	Name, Title	Description of role
Decision maker	{Name}, Executive Director	• Support/champion/provide legitimacy to the project • Sign off on significant decisions about the direction of project • WHAT ELSE? • WHAT ELSE?
Financial analyst		
Competitor research		
End-user research		
Customer research		
??		
??		

??		
??		

What is your target date for starting this venture?

How often will your team meet?

What criteria will be used to make a final go/no-go decision (this can evolve)?

What is your timeline for this process? Use this timeline, if helpful

Activity/ Milestone Related to the Process	Month											
	1	2	3	4	5	6	7	8	9	10	11	12
Form planning team, with approval of executive director	x											
Discovery interviews with key staff from our org	x	x	x									
Discovery interviews with potential consumers	x	x	x									
Bi-weekly planning team meetings	X	X	X	X	X	X	X	X	X	X	X	X

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Social Enterprise Planning Template, Part 2 (Task List)

This task list can be filled out with consideration of the planning work the group has already completed, such as identification of: core competencies, competitors, target consumers; completed financial analysis, etc. Be as specific as possible. It's ok if there is some overlap with your Activiities

Task List Template

Task/Item to Collect	Description	Who	Deadline	Status
Content-Related Items				
Interview our CFO		Stella	3/12/25	
Interview our Director of Programs	To get ideas about potential new ventures, identify existing ventures that have potential to generate $.	Cavitra	4/1/25	
Interview NAME???		Jose	5/1/25	
Interview NAME???		John	5/1/25	
Collect consumer data	Potential sources include: ????	Stephanie		
Process-Related				
Speak with our ED	Discuss our plan and get buy-in		3/12/25	
Setup team meeting schedule	Put on Google Calendar to formalize dates/times	Cavitra	4/1/25	

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Information we need to complete the above tasks, but do not yet have

1.
2.

Programmatic questions to discuss with team

1.
2.

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