

HeartShare HeartShare HeartShare HeartShare  
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## Developing a Business Plan

Melissa R. Ferrari, Vice President of Operations  
 for HeartShare St. Vincent's Services  
 Management Training Program (MTP)



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### What We Will Cover:

- Team Dynamics
- Choosing a Topic
- Brainstorming a Solution
- The Written Proposal
- The Oral Presentation

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### Why do we have to do a Group Project?

- The group project is the culmination of all of the classes that you have taken during your participation in the MTP Program
- The skills you have learned in MTP have been carefully developed to assist you with this project.



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## Why do we have to do a Group Project?

### Track I: Business Skills

- Time Management - Interviewing, Recruitment & Retention - Supervision & Progressive Discipline - Performance Evaluations - Accountability - Delegation - Networking for Accessing & Developing Resources - Fiscal Responsibility

### Track II: Communication

- Effective Communication (and Barriers) - Running Participatory Meetings - Customer Service - Conflict Resolution - Using a Person Center Approach

### Track III: Leadership

- **Writing Successful Business Proposals** - Creating Your Vision - Strategic Planning - Staff Motivation and Team Building - Supervisor as Coach

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## Working as a team:

Excerpted from: <http://www.projecttimes.com/articles/10-steps-to-creating-a-project-plan.html>

### Hold a kickoff meeting

The kickoff meeting is an effective way to bring stakeholders together to discuss the project. It is an effective way to initiate the planning process. It can be used to start building trust among the team members and ensure that everyone's idea are taken into account. Kickoff meetings also demonstrate commitment from the sponsor for the project.

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## The Kick-Off Meeting:

Here are some of the topics that might be covered:

- Team Building
- How the team will make decisions & developing "ground rules"
- Assigning Roles and Responsibilities
- Team commitments
- Project vision and strategy

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## The Kick-Off Meeting – Team Building:

### Two Truths and a Lie

Two truths and a lie is a short team-building exercise played with a small group of three to 10 participants. It allows team members to learn little-known facts about each other while having fun. Each team member writes down two truthful statements and one lie about themselves on a piece of paper. Then each person takes turn reading the three statements and the other team members must guess the incorrect statement. To make the game more interesting, team members should write down subtle statements as the incorrect one. It makes it more difficult for people to guess the right answer, which provides for a more interesting exercise.

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## The Kick-Off Meeting – Making Decisions & Ground Rules:

- **Setting goals and establishing procedures**
  - Reaching agreement on goals
  - Setting group goals
  - Managing multiple goals
  - Changing goals

For more information: <http://www.fao.org/ad/PPdirect/PPa0009.htm>

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## The Kick-Off Meeting – Making Decisions & Ground Rules:

**Reaching agreement on procedures** - Once a group has a clear set of goals, it needs to decide how to achieve these goals

- **Consensus** Using consensus, group members seek to reach full agreement, and a single member can block the group from making a decision. Consensus usually involves careful listening and full member participation in discussions. This procedure ensures full group support for decisions and protects group minorities from stronger majorities, but it can result in long meetings and delays.
- **Majority** Using majority rule, a group needs the agreement of a majority (51 % or more of the membership) to reach a decision. Groups often reach majority decisions through brief and somewhat formal discussion, then a final vote where members raise their hands. This procedure often moves forward more quickly and creates clearer debates, but it can result in group factions and a dominant and "permanent" majority.

For more information: <http://www.fao.org/ad/PPdirect/PPa0009.htm>

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### The Kick-Off Meeting – Making Decisions & Ground Rules:

Barriers to Small Groups – Other Problems

- Long meetings vs. Short Meetings
- Unequal group commitment and involvement
- Balancing member involvement
- Group conflicts
- Varying communication and literacy skills
- Different communication styles
- Poor group memory

For more information: <http://www.fdu.org/ad/PP03doc/P03a000.htm>

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### The Kick-Off Meeting – Role & Responsibilities:

- Roles and Responsibilities should be assigned to all group members and work should take place outside of group meetings.
  - Exception: Team Responsibilities assigned for during meetings:
    - ie Team Leader, Group Meeting Leader, Note taker, etc.
- Team Members may have multiple roles
- Work should be distributed evenly amongst ALL team members
- Identify team members strengths and use them to your advantage.

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### The Kick-Off Meeting – Team Commitments:

1. **Commitment to each other and each other's success.** Teams that are comprised of individuals that actively support, believe in and care about the success of each other will be more successful. This type of commitment promotes the comfortable shifting of duties and responsibilities among team members as necessary and allows teams to have less stress and higher productivity.
2. **Commitment to their team and the team's success.** Team pride and commitment is important to ultimate success. The commitment that arises from a team that understands their role and relishes achieving it is hard to undervalue. Teams with this type of commitment will overcome long odds due to their strength and unity and willingness to band together to get through a tough situation. Why? Because they see the effort as worth it for the good of the team.
3. **Commitment to the organization and organizational goals.** When teams see their work as supporting valuable and important organizational pursuits, this type of commitment is strengthened. This can't be built without a clear understanding of company direction and goals, but with those in place this commitment can grow. Like the internal team commitment, this manifests in organizational pride and a clear sense of obligation to the greater good.

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### The Kick-Off Meeting – Vision & Strategy:

- The topics:
  - Improve Communications Agency-wide
  - Increase Staff Selection & Retention
  - Creating a Culture of Accountability
  - Job Satisfaction Survey

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### The Kick-Off Meeting – Vision & Strategy:

- The solution that your group comes up with & strategy for implementing that solution should be agreed upon by all members of the group.
- This is what you hash out in your team meetings.
- Begin by having a BRAINSTORMING session.

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[https://www.youtube.com/watch?v=-QIGW1xp\\_Co](https://www.youtube.com/watch?v=-QIGW1xp_Co)

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## The Written Proposal:

### The Nuts and Bolts

This should be type-written, no more than 10 pages.  
Please bring **15** copies to the last class for MTP Committee members, not classmates.

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## 7 Tips for Creating a Great Business Proposal:

Source: 7 Tips for Creating a Great Business Proposal, by Steve Strauss

- 1. Write Clearly and Succinctly
- 2. Make a Good Argument and Counter Possible Obstacles
- 3. Show Your Personality
- 4. Use Graphics Intelligently
- 5. Don't Oversell
- 6. Avoid Boilerplate Language and Catch Typos
- 7. Always Keep the Reader in Mind

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## The Written Proposal:

- Identifying your Goal
- Performing a SWOT Analysis
- Listing your Objectives
- Developing Your Strategy
- Designing an Implementation Timeline
  - Identifying the Participants
  - Analyzing the Cost Funding,
- Incorporating HeartShare's Mission, Vision & Values into your proposal

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### The Written Proposal – Defining the Problem and the Solution:

- The Written Proposal
- **Clearly DEFINE the problem** that you are proposing a solution to
  - If you can not clearly define and understand the problem – how can you possibly proposed a proper solution
- **Clearly DEFINE the solution** that you are proposing
  - Don't be vague here

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#### The Lemonade Stand

**Problem:** Tommy want to raise money to help his Dad

**Solution:** Tommy is going to sell homemade lemonade.




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### The Written Proposal – SWOT

- Strengths (Internal)
- Weaknesses (Internal)
- Opportunities (External)
- Threats (External)

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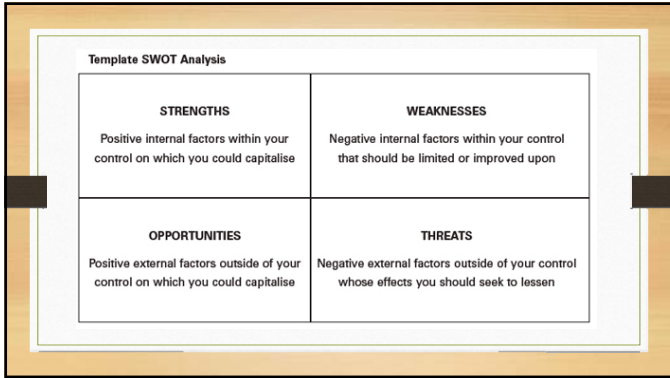
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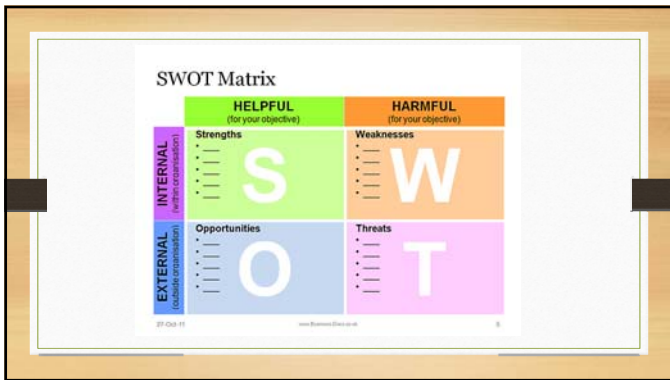
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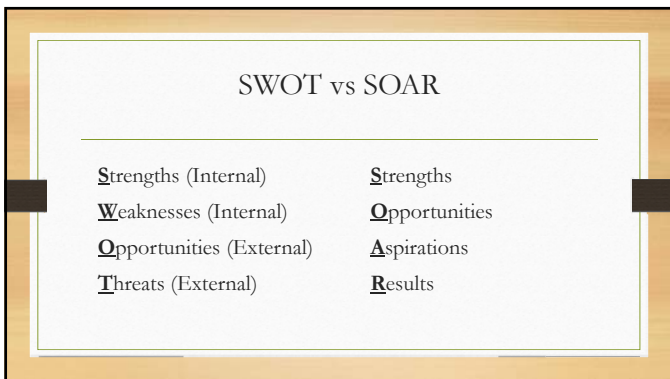
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### Why SOAR instead of SWOT?

<http://www.appreciativeinquirymanagement.com/soar-vs-swot/>

In Appreciative Inquiry strategic planning sessions we SOAR instead of SWOT. What is the difference? The difference is profound in that when we SOAR we explore all the potential for the organization with the minds of all the participants open and creative and the positive energy unhindered by negative impediments.

“...because the exercise of analysis of Weaknesses and Threats inhibits the thought processes. Participants are constantly reminded of the constraints confronting them and can often get completely bogged down in discussion about intractable organisation deficits and external threats that are beyond their control.”

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### The Written Proposal – Objectives:

How will you accomplish each goal that you have defined in your opening?



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### The Written Proposal – Objectives:

- ✓ We will build a lemonade stand.
- ✓ We will market the lemonade stand by making signs.
- ✓ We will sell lemonade in cups to people that pass by.



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### The Written Proposal – Strategies

What specific steps and actions are needed to accomplish each objective?



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### The Written Proposal – Strategies

To Build a lemonade stand we will need:

- ✓ A plan
- ✓ Supplies (Wood, nails and paint)
- ✓ Someone to build the stand
- ✓ A place to put the stand



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### The Written Proposal – Strategies

To market our lemonade stand we will need:

- ✓ Supplies (Paper, Markers, wood stakes)
- ✓ Someone to make the signs
- ✓ Someone to hang the signs up



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## The Written Proposal – Strategies

To sell our lemonade we will need:

- ✓ Ingredients: Lemons, Water, Sugar
- ✓ Pitchers & Cups



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## Do Your Homework!!

- Interviews
- Internal Resources
- External Resources
- Literature
- Studies & Surveys



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## Sell Your Idea!

Don't forget to include the benefits of completing the project, as well as the project justification.



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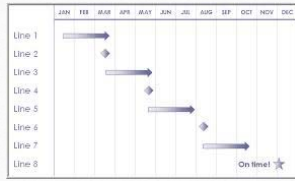
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### The Written Proposal – Time Line:

Outline the time frame for implementing each strategy, due dates for completion of each objective, and ultimate deadline for completion of your proposal.




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### The Written Proposal – Time Line

#### Who will do what:

- ✓ Sat/Sunday: Buy Stand Supplies & Build Stand
- ✓ Thursday: Buy Ingredients & assure that we have pitcher and enough plastic cups
- ✓ Friday: Make Lemonade and put in fridge
- ✓ Saturday Morning Put up signs around town
- ✓ Saturday, 10:00 – OPEN STAND!




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### The Written Proposal – Participants:

- Who will be involved in the implementation of this proposal?
- Who is responsible for overseeing each objective and strategy?

(list title/position and department only)




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### The Written Proposal – Participants

**Who will do what:**

- ✓ Dad: Buy supplies and build stand
- ✓ Mom: Buy lemonade supplies and cut lemons
- ✓ Jack (Tommy's big brother): Put up signs on his bike
- ✓ Tommy, Billy, Sally & Emily: Sell Lemonade




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### The Written Proposal – Cost Funding:

- What are the potential added costs?
- How do you justify these costs?
- How can you offset these costs?
- Are there any cost savings to be realized?




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### The Written Proposal – Cost Funding

SWOT!!!

<b>Lemonville Telegraph</b> <b>Sunny and Hot Today</b> <small>Read news covered by...</small>		
Assets \$ 6.00	gross profit: \$ 6.00	
Cost per glass 10¢	Advertising expenses: \$ 1.00	
You charged 30¢ per glass.	Product expenses: \$ 2.00	
You made 20 glasses.	Total expenses: \$ 3.00	
You sold 20 glasses.	<b>Net profit: \$ 3.00</b>	
<b>Lemonade Stand</b>	day 1	<b>GO!</b>

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**The Written Proposal –  
Incorporating HeartShare’s Mission, Vision & Values**

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**Our Mission**

- The mission of HeartShare Human Services is to nurture and support, with dignity and respect, children, adults and families in order to expand opportunities and enhance lives.

**Our Vision**

- HeartShare’s commitment to excellent services and supports will enable children, adults and families to reach their fullest potential and lead meaningful lives as active participants in society.

**Our Values**

- Commitment to the Individual, Integrity, Excellence, Collaboration & Innovation

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**The Written Proposal**

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- Use the same font type and size
- Clearly outline sections
- Have good flow
- Use attachments
- Make a cover sheet (Title & Names)
- Proofread it!!
  - Gramer & spellin’ R important




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Still  
with  
me?




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### The Oral Presentation:

#### The Nuts and Bolts

This should be an outline of your written proposal on PowerPoint, no more than 15 minutes.  
You should bring printouts of your slides for people to take notes on

Note: You must email your PowerPoint presentation to Melissa Ferrari ([Melissa.Ferrari@hs-northcarolina.edu](mailto:Melissa.Ferrari@hs-northcarolina.edu)) by December 8, 2014.

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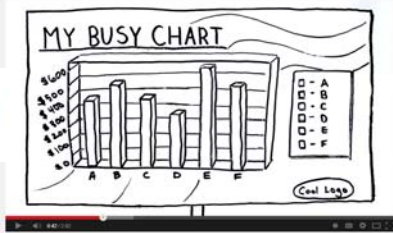
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<https://www.youtube.com/watch?v=i68a6M5FFBc>

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[https://www.youtube.com/watch?v=cI\\_GItnRopIM](https://www.youtube.com/watch?v=cI_GItnRopIM)

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### The Oral Presentation:

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**Do:**

- Summarize
- Simplify
- Add Visuals
- Make sure your written proposal and oral presentation are saying the same thing!

**Don't:**

- Text text text, text, Text text text lot of text, and even more text. No one is saying you can't have any text but your PowerPoint should not be a regurgitation of your written proposal on PowerPoint Slides – you know what I am saying here? Did any of you actually read this entire paragraph? And did I make my point?

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### Dress the Part



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### What to wear?

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Know your material

Be able to freely talk about the problem and your proposed solution WITHOUT the use of notes!!



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Engage  
the  
Audience



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An amateur practices something until he gets it right.  
**A professional practices until he can't get it wrong!**

- music proverb

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## Understanding the Rubric:

**Definition:** A rubric is a **scoring tool** that teachers use to assess student learning after a lesson. Using a **set of criteria and standards** (directly tied to the stated learning objectives), educators can assess each student's performance on a wide variety of work, ranging from written essays to **class projects**. When a rubric is **agreed-upon and communicated prior to the student's work being completed**, the grading process is very **clear** and **transparent** to all involved. Often, it is helpful to have more than one evaluator grade each piece of work. Then the rubric scores can either be averaged or added together for a final score.

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## Understanding the Rubric:

Rubrics are often used to grade student work but they can serve another, more important, role as well: **Rubrics can teach as well as evaluate**. When used as part of a formative, student-centered approach to assessment, rubrics have the potential to help students develop understanding and skill, as well as make dependable judgments about the **quality of their own work**. Students should be able to use rubrics in many of the same ways that teachers use them—to clarify the standards for a quality performance, and to guide ongoing feedback about progress toward those standards.

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Requirements	Proposal Rubric			
	4	3	2	1
NOIR analysis	All five elements are clearly stated, appropriate, and significant.	Most elements are clearly stated, but some are lacking in appropriateness and/or significance.	One or two elements are not clearly listed and/or lack appropriateness or significance.	Most elements are inappropriate or insignificant.
Goals	Very clearly stated.	Stated with some clarity.	Stated, but generally lacking clarity.	Not stated.
Objectives	Objectives are consistently stated in measurable or observable terms.	Only some objectives are stated in measurable or observable terms.	Some of the objectives are stated in measurable or observable terms.	Offers no objectives.
Strategies	Creates all aspects necessary to accomplish goals.	Creates most aspects necessary to accomplish goals.	Only creates 1-2 aspects necessary to accomplish goals.	Fails to create any aspects necessary to accomplish goals.
Timeline	Dates are realistic given size of project.	Dates are realistic given size of project, but needs some minor adjustments.	Dates are too general, not specific enough.	No timeline or dates included.
Participants	All participants are identified and matched to each strategy.	Most participants are identified and matched to each strategy.	Only a few participants are identified and matched to each strategy.	Fails to identify any participants for each strategy.
Cost Funding	All costs are clearly defined and realistic, in line with adjustments are made to make it more cost-effective.	Most costs are clearly defined and realistic, in line with adjustments are made to make it more cost-effective.	Fails to clearly define costs, or not realistic, some adjustments are needed to make it more cost-effective.	Fails to clearly define costs, or not realistic, no costs effective.
Reference to mission, vision and values	Relationship is clearly stated.	Relationship is stated with some clarity.	Relationship is stated, but generally lacking clarity.	Relationship is not stated.

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