

# WHAT'S THE PLAN?



## OBJECTIVES

- Provide an opportunity for peer-to-peer learning and decision-making
- Provide an opportunity to experience the first steps in moving from ideation to a written articulation and action plan of the initial vision
- Introduce the components of a Business Plan



## TIME

- **90-120 minutes:** Be sure to reserve no less than 60 minutes for the full “Getting Down to Business (Planning)” activity.
- **Add 15-20 minutes:** If beginning or ending your engagement with a group using this training, you will need to incorporate an opening and/or a closing session similar to those in “Beginning the Work” and “Bringing It All Together,” respectively. Refer to those sections for tips on how to introduce and close workshops.



## PREPARATION

### SUPPLIES

- Scrap Paper
- Pens & Pencils
- Post-its

### MATERIALS

- Character & Cooperative Creation: Steward's Guide
- Character & Cooperative Rolling Key
- Character & Cooperative Role Sheet
- Coop Biz Plan Agenda
- Coop Biz Plan Learning Aid



## PREPARATION (continued)

### ADAPTATIONS

- ◀ **Audience:** For this role play activity, you have the option to allow for participants to randomly create identities of different employment status and income level. You may elect to pre-determine certain identity aspects, rather than have participants randomly roll for them - e.g. if working with a student group, having each participant role play a character with their same education status.
  - ◀ Be aware that, through roleplay, some issues may come up regarding the level of awareness of your participants with regards to the functioning of racism, sexism, homophobia, transphobia, classism, etc. While this has the potential to create space for education, it can also make the space unsafe, and can derail the ultimate objectives of the role play. Reflect on what level of engagement you feel comfortable having with the dynamics of identity and prejudice as part of this activity - and, assess how much of that is engagement is possible while meeting the workshop objectives.

# WHAT, WHO, WHEN, WHERE, WHY

This section provides an overview of one process for moving from “idea” to “plan.” Foundational knowledge is built by playing a game to identify what kinds of information are included in a business plan - specifically, “what, who, when, where, and why” of a Business Plan. Following, participants will use those basic groupings of information and practice reorganizing it into a more formal plan format.

1. **FRAME:** Introduce this section as being, at its most fundamental level, how an idea or conversation moves into a plan that will ultimately require group consensus for implementation. More specifically, it is about how to write a Business Plan – one method for moving from idea towards action.

## 2. ASK: What is a Business Plan?

- A. **CONTRIBUTE:** As participants respond to the question, fill in any gaps and add your own thoughts and perspectives in order to present all of the following information -

- **(Cooperative) Business Plan (n.)** - A summary of how the cooperative endeavor will be organized and implemented to ensure success of the resulting enterprise.

- **It is a document or group of documents**, exploring the who, what, where, why, when, and how of your cooperative enterprise.
- **A Business Plan is a form of creative writing.** It is a chance to tell others about the co-operative magic you are creating, about the alternative economies you are crafting, and about the equity you are building for all people. It also serves as a chance for you to add to the story of the cooperative movement!

3. **FORM SMALL GROUPS & DISTRIBUTE POST-ITS:** Form groups of five or fewer and distribute stacks of post-its to each person.
4. **PROVIDE INSTRUCTIONS:** Share that the kinds of things in a Business Plan are the kinds of information anyone impacted by a cooperative’s development might want to know. It isn’t necessarily highly technical information - it is the story of the project. Using one post-it per item, we’ll journal the kinds of things we or that we think others might want to know about a given cooperative scenario. We’ll then work in our small groups to organize the post-its into “what, who, when, where, and why” categories to prepare us to move them into a more formal Business Plan outline. Notice there’s no “how” included - that is what the cumulative responses to the “W” words will illustrate.

- A. SHARE COOPERATIVE SCENARIO:** Present a simple cooperative scenario of a start-up organization using either:
- » A Cooperative News article developed by participants in the “Coops As Tools” workshop;
  - » One of the cooperatives broken down into “Who,” “What,” “Why,” and “?!” in the “Using Coops” workshop - present it in narrative format, not verbatim in the “Who...” format; or
  - » Use a real or fictional cooperative scenario and present the “Who,” “What,” “Why,” and “?!” information - present it in narrative format, not verbatim in the “Who...” format.

**5. ASK:** If you were a stakeholder in the community impacted by that start-up cooperative, what kinds of things would you want to know about the project?

**6. TRANSITION FROM JOURNALING TO SMALL GROUP WORK:** After sufficient time has elapsed, direct participants to turn to their small groups and start organizing their post-its together into the following categories: “Why,” “What,” “Who,” “How,” and “When”

**A. PROVIDE INSTRUCTIONS:** Once all post-its are grouped, instruct the small groups to further categorize, remix, and rename the clusters in a more descriptive and/or specific way. Then, order those newly named clusters in an order that makes sense to the group for a Business Plan.

**7. BRING THE GROUP BACK TOGETHER:** Once the small group work is complete, bring the group’s attention back to you. Share that they’ve essentially created a Business Plan Table of Contents, and that they’ll present their Table of Contents after comparing it to Table of Contents you provide.

**8. PRESENT:** Share the following Business Plan Table of Contents, and briefly describe each heading in one to two sentences (*use the Learning Aid in the Appendix for guidance*)-

- ◀ **SUMMARY I:** What, Why, & Who
- ◀ **STRUCTURE:** Membership & Management
- ◀ **CONTEXT:** Market & Niche
- ◀ **STRATEGY:** Outreach & Marketing
- ◀ **CAPITAL:** Financing & Fundraising
- ◀ **PLANNING:** Risks & Obstacles
- ◀ **ASSESSMENT:** Goals, Objectives, & Benchmarks

**A. PREPARE GROUP FOR PRESENTATIONS:** Ask the small groups to discuss together what differences and similarities they see between what was just presented and what they developed independently. Direct each group to identify a person or person to present the key similarities and differences to the large group.

**9. LEAD PRESENTATIONS:** Move through the group presentations, providing timechecks, as needed. Take notes on some key patterns to prepare for the digestion discussion following presentations.

**10. DISCUSS:** Once all the groups have presented, lead a digestion discussion using the following prompts, and try to draw out the subpoints listed below some of the questions -

**Anything jump out or surprise you about the process or the items included in the Table of Contents?**

→ You already know a lot of the stuff in here!

**Does filling out the information in the Table of Contents seem easier or harder than you thought?**

→ **It's likely easier than you think:** Often, you can begin your Business Plan without calling it that - by just gathering the evidence of your progress in a single document space, you are actually beginning the writing process!

**Given the content in a Business Plan like this, when do you think you might be ready to start working on a Business Plan during the entrepreneurship process?**

→ **Don't wait until you "have it all figured out:"** Think of your Business Plan as a "living document" - meaning you will put many things into it as you go along, changing and updating it over the course of the weeks and months. While it may seem counterintuitive, you will likely find that having something written down makes things more concrete (less abstract!), so your group can more easily make clear decisions and commit to actions.

**Knowing now roughly what is included in a Business Plan, how would you go about writing one in a cooperative entrepreneurship process of your own?**

- **There are countless ways to go about writing a Business Plan:**  
There is no perfect or wrong process, and what ends up working for one group - but, here are some tips...
  - » **Start with a Table of Contents:** Create a Table of Contents in a document. Add information to the appropriate section/s as you have it drafted (could be general info, links, or finished narrative).
  - » **Delegate Duties:** Delegate sections and tasks to individuals and sub-committees to share the workload and to play to the expertise in your group (e.g. Ask the Finance Committee to complete items related to budgeting.).
  - » **Centralize Coordination:** Assign at least one person be responsible for collecting all contributions into a single document; add the responsibility of generally managing the creation process – including providing deadlines (when necessary) and following up with those responsible for contributions to support them in ensuring they get the work done on time.
  - » **Editing & Finishing is an important task:** Assign one person or a small subcommittee of folks to be responsible for “finishing” the document. This involves editing the entire document to ensure that language is coherent throughout, as well as that the document is nicely formatted - making it visually cohesive and appealing.

### 11. ASK: Why bother with any of this? What about the process or the product is useful or important?

- A Business Plan **articulates your cooperative vision to others** in and on your own terms - you can tell your story in an empowered and uninterrupted way!
- A Business Plan **is an accountability tool.** Having something written (business plan) that everyone can commit to helps with accountability and keeping track of agreements across time.
  - » **Get the kinks out:** It can help to clarify disagreement or conflict around issues – you are able to focus dialogue around the written articulation (Business Plan).
- **Your business plan can be a way to legitimize your project.** People often hesitate to support projects, financially or otherwise, that can't be demonstrated to be well organized, feasible, and beneficial to those involved.
- **Safeguard a project's sustainability** - people can be transient, so sometimes projects will get started and not finished. With a plan, someone can pick up where you left off without much effort.

# GETTING DOWN TO BUSINESS (PLANNING)

Through role play, participants will move through the process of turning an idea into something actionable through the authoring of an outline for a Business Plan. The activity seeks to provide participants an opportunity to practice identifying all the elements that need to be considered for a successful Business Plan.

1. **FRAME:** Explain that the group will be roleplaying a meeting of their stakeholder group that includes walking through a Business Plan Table of Contents and answering questions as a group to get a better idea of what actually goes into a plan.
2. **SHARE:** Distribute the Coop Biz Planning Agenda to the group.
3. **SOLICIT VOLUNTEER(S):** Ask for one volunteer for every five people in the group who is willing to serve as the “Steward” and guide a small group through a dice rolling process to determine each person’s role and the type of cooperative start-up they will be role playing. If any participants have experience playing tabletop Role Playing Games (RPGs - e.g. Dungeons & Dragons), the task will be familiar to them.
  - A. **REVIEW CHARACTER & COOPERATIVE: STEWARD’S GUIDE:** As the group is discussing the following question in pairs, move through the guide with the volunteers as a group, ensuring comprehension of what it asks of them.
4. **ASK (for discussion while Steward’s are gathered):** Have you ever planned an event? How did you go about planning it? How did you keep track of decisions made and things yet to do?
5. **FORM SMALL GROUPS:** Create groups of five (or fewer).
  - A. **DISTRIBUTE CHARACTER & COOPERATIVE ROLE SHEET:** Give the worksheet to all participants and ask them to read it through while the “Stewards” get set-up.
  - B. **DISTRIBUTE DICE:** Give a die or set of dice to each “Stewards.”
  - C. **ASSIGN “STEWARDS:”** Match up each small group with a “Steward.”
6. **PASS LEADERSHIP:** Once the groups are coordinated, pass leadership off to the “Stewards” to walk through the Character and Cooperative creation process.

If your group completed the “Taking the Wheel” activity, use the same groups, roles, and scenarios. Consider this activity a continuation of that role play. Skip steps 3 through 7 if this is the case for you.

7. **MONITOR ACTIVITY:** As participants are creating their characters and cooperatives, move around the room to answer any questions that may arise.
8. **BRING THE GROUP BACK:** As participants finish up the character and cooperative creation process, bring their attention back to you.
9. **REFORM SMALL GROUPS:** Direct participants to regroup as they were before, and hand off leadership to the Facilitator in each group identified in the character and cooperative creation process.
10. **MONITOR ACTIVITY & PROVIDE TIMECHECKS:** Listen in and provide input if requested during the activity time. Additionally, provide “time checks” - let groups know how much time has passed and how much time remains to assist folks in following their agenda in order to meet the group’s goals.
11. **PREPARE FOR PRESENTATIONS:** Let folks know at this point that they will need to decide, using their agreed upon group process practices, how to present the following information to the larger group in 5 minutes or less: The following format is also included in the agenda handout:
  - If this is the group’s first role play with these scenarios, begin with:
    - ♦ Who are the people, generally, involved in your cooperative endeavor?
    - ♦ What kind of cooperative solution are you pursuing?
    - ♦ Anything exciting or notable to share?
  - Summary of “Structure” section
  - Summaries of two of the following sections: “Context,” “Strategy,” “Capital,” “Planning,” “Assessment”
12. **BRING GROUP BACK TOGETHER:** Check in with groups to determine group progress. Groups that haven’t finished should be encouraged to wrap up their conversation and to decide which agenda items or issues they will need to address in a future meeting
13. **LEAD PRESENTATIONS:** Lead the small groups through their presentations, providing time checks, as needed.
14. **DISCUSS:** To summarize the learning that occurred during this activity, engage participants through the following questions -

**DESCRIBE:** *What do you feel you accomplished via the planning process?*

**REFLECT:** *What aspects of the planning process were easy versus difficult?*

**INTERPRET:** *How might this planning process differ from “in real life” versions?*

**APPLY:** *Did you learn anything from the planning process that you could apply to a “real life” situation?*

**15. CLOSE OUT ACTIVITY:** If the discussion does not naturally close out the learning process, ask for any final comments or questions before bringing the activity to an end.

