**Guidelines For Using The Business Plan Template**

When developing your business plan, it’s useful to think of the overarching goals / pillars of PNZ and consider how your group can contribute to those goals at a local level:

|  |  |
| --- | --- |
| **PNZ Pillar** | **Key Deliverable** |
| **QUALITY** | Career development |
| Cultural competence |
| Leadership |
| Governance |
| **VALUE** | Member value |
| Support services |
| Partnership |
| Collaboration |
| **VOICE** | Promote physiotherapy to New Zealanders |
| Advocacy for profession |
| Cohesion |
| Global networks |
| **KNOWLEDGE** | Continuing professional development |
| Innovative |
| Capability |

## **Goal Setting (Annual Objectives)**

You don’t need to set something for each goal or deliverable and it doesn’t need to be lengthy – your plan should be relevant and realistic for you – but ideally, your plan should show how you’re adding to PNZ’s overall direction in some of those areas. An example might be:

|  |  |  |
| --- | --- | --- |
| **Goal** | **Why we have this goal** | **Timing** |
| Match or increase the number of CPD resources and activities delivered in previous year (*2xCPD events were delivered in 2018*) | To promote continuous professional development/career development within our membership | As detailed in ‘Planned Professional Development’ table |
| Improve public knowledge of local / specialized physiotherapists | To promote physiotherapy to New Zealanders | As detailed in ‘Other Activities’ table |
| Provide Branch/SIG contributions to Physio Matters, PNZ Website and media enquiries | Member value / collaboration / partnership | As detailed in ‘Other Activities’ table |

The above goals align with the Pillars of **‘Knowledge’, ‘Quality’, ‘Voice’ and ‘Value’** – with some of PNZ’s key deliverables for each being listed in the **Why we have this goal** column. Delivery against those goals can then be reported in the **Planned Professional Development** and **Other Activities** tables of your plan:

**Planned Professional Development**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Activity** | **Topic** | **Dates** | **Location** | **Costs/budget** | **Attendance** |
| CPD session | Management of back pain | April (TBC) | Dunedin (TBC) | $200 | 30 (min) |
| Presentation to final year students | How to run a private business | 17 May | Otago University | $150 | 25 |
| AGM with guest speaker (Prof. Thor Acic) | Disorders of the spine | June (TBC) | TBC | $2500 | 80 (min) |

**Other Activities**

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Details** | **Dates** | **Costs/budget** |
| Develop a list of subject matter experts for media enquiries | To be aligned to PNZ registration data. | By June 2019 | Nil |
| Align own branding with PNZ and support PNZ ‘Find a Physio’ listings | Add PNZ branding to existing website, social media forums and other resources / Promote PNZ ‘Find a Physio’ listings in any public-facing engagements. | April 2019-Jun 2020 | $500 |
| Provide content on CPD sessions and AGM for Physio Matters | Event listings and access to educational resources linked to sessions / conferences / study days. | 20 Feb / 19 April  | Nil |
| Renew subscription to “Journal of Physiotherapy for the Left Foot” | Journal for Member access – valued by current members | Due 31 March 2019 | $25,000 |

**Financial Planning**

The key thing to remember is that your budget for the financial year will be allocated according to what’s in your business plan, so it’s vital that you include everything you know is – or is likely to be – happening over the next 12 months (covering the period 01/07/20 to 30/06/21).

As a general rule, when estimating income and expenditure, previous events of a similar nature are the best guide.

Income – mainly comes from SIG Subscriptions or Courses. Subscriptions generally remain consistent from year to year – our Membership Advisor can help you with the past years’ subscriptions so you can calculate the expected subscription revenue. Course fees need to be calculated based on expected costs to run the course, such as venue hire and catering. Work out the expected cost per attendee to calculate the ticket price for attendance, which will in turn give an expected course income, and any margin required to cover unexpected costs.

Expenses - generally relate to running courses, and meetings. Costs for venue hire, catering and travel can usually be estimated fairly well by obtaining quotes from the likely supplier, or using past costs as a guide. Speaker costs are usually negotiated individually, but are often just a Koha or expense reimbursement (travel / accommodation / meals etc.).

**Further Support**

If you require further support to complete your Business / Financial Plan, please contact bridget.ng-wai@physiotherapy.org.nz