



Business Plan Outline

Water System Partnerships Workshop

A professional business plan will prove beneficial in the long-term success of a partnership. Below is an outline of a business plan to support the formation of a regional partnership. Water systems can use information from the Module 8 Partnerships Action Plan Exercise (e.g., background information, leadership roles, goals of the partnership) to support the development of a formal business plan.

Section 1: Introduction

- Background on any past regional efforts in the area or partnerships between the water systems
- Introduction of the challenges the water systems faced
- How the business plan development was funded

Section 2: Organization Structure and Services Agreement

- Organizational chart showing how personnel will work together
- Services that will be covered under the partnership
- Description of what each partner will be responsible for under the agreement

Section 3: Forming the Partnership

- Mission statement
- Key steps to initiate the partnership (e.g., how a management entity is formed)
- Detailed roles and responsibilities of all partners
- Goals and priorities of the partnership
- Discussion of how the goals will be met

Section 4: Best Management Practices

- Shared policies or programs (e.g., organizational policies, employee benefits packages, human resources policies and procedures, or IT policies and programs)
- A detailed record of water systems' liabilities and assets

Section 5: Financial Information

- Current financial information for all partners
 - Financial policies and procedures
 - Current bank statements and operating budgets
- Rate structures and outcomes of a rate study
- An Asset Management Plan

Section 6: Community Information and Outreach

- Public messages and meeting materials
- Discussion on the public involvement
- Planned meeting dates



Section 7: Job Descriptions

- Descriptions of specific roles required under the partnership (e.g., bookkeeper, coordinator/facilitator, or water operator)
- Discussion on responsibilities of the various jobs

Section 8: Questions and Concerns

- Frequently asked questions and responses (e.g., timeline, rates)

Section 9: Resources and Other Tools

- Additional resources and tools that the water systems may find valuable in forming a partnership

