Replication Development Report

Template

Prepared by:

Month, Year

**A note about this Replication Development Report template from us:**

This document is intended as a guide to the most common content that your Replication Development Report should contain. Each replicated programme is different and there will be additional sections needed. Expert advice is recommended to ensure that errors are not made that may affect the sustainability of the replicated network.

Spring Impact is a not-for-profit organisation that seeks to replicate successful social ventures to scale. Spring Impact asks that if you use this document to develop your manual you:

1. Let us know that these resources have been used so that we can keep track of our own social impact
2. Note in the report that the Spring Impact resources were of assistance in producing it so that more may find out about and take advantage of our resources

**Spring Impact can be contacted** [**here**](https://www.springimpact.org/contact/)**.**

This document was developed in partnership with the Franchise Company

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# EXECUTIVE SUMMARY

Insert a short summary of the Replication Development Report containing a brief statement of the proposal covered in the report, background information, concise analysis, findings summary and a set of main conclusions.

# BACKGROUND

Give a brief background around why you are preparing the Replication Development Report.

# Your organisation

## BACKGROUND

What does your organisation do?

## PROGRAMME NAME

* + 1. **LOCATIONS**
    2. **STRUCTURE**
    3. **VARIATION ACROSS REPLICATIONS**

## SCALING STRATEGY Insert elements of your scaling strategy, as defined during the Prove stage of the Toolkit.

* + 1. **PROBLEM DEFINITION**
    2. **VISION AND MISSION**

‘What kind of world are we trying to achieve?’

* + 1. **IMPACT GOAL**

‘What is the specific impact we are trying to bring about?’

* + 1. **YOUR CORE**

Describe exactly what you will be replicating and why.

* + 1. **WHY REPLICATION?**

Describe why you have chosen replication as the most appropriate way to address your social problem.

# Your replication model

## REPLICATION MODEL CHOSEN

Which replication model will you be using?

## WHY

## Why have you chosen this model?

# PESTLE ANALYSIS

Complete the different sections of the PESTLE analysis following the guidance given in the Toolkit. Note the implications of each for your replication.

* Political
* Economic
* Social
* Technological
* Legal
* Environmental

# SWOT Analysis

The SWOT analysis summarises the charity’s Strength, Weaknesses, Opportunities and Threats. This is in relation to its plans to expand the business by franchising.

The strengths and weaknesses are usually related to the businesses internal environment and are things that can be influenced or even changed by senior management. The opportunities and threats relate to the charity’s external environment.

Any deficiencies identified should be dealt with before those weaknesses become embedded within the franchise network. Threats should be minimised, where possible, and opportunities taken up with a well-developed strategy.

|  |  |
| --- | --- |
| STRENGTHS People  Resources  Innovation and ideas  Marketing  Operations  Finance  Partnerships  Existing implementers (if you have already replicated) | WEAKNESSES People  Resources  Innovation and ideas  Marketing  Operations  Finance  Partnerships  Existing implementers(if you have already replicated) |
| OPPORTUNITIES People  Resources  Innovation and ideas  Marketing  Operations  Finance  Partnerships  Implementers | THREATS People  Resources  Innovation and ideas  Marketing  Operations  Finance  Partnerships  Implementers |

# DEsigning your replication model

The objective of the replication modelling exercise is to create a ‘blueprint’ or ‘business model’ for a future replicated network by making assumptions about the structure, roles and responsibilities involved. The model is then used as the basis for evaluating the operational and financial viability of the system and for looking at the implications of replicating.

## Possible implementers

List implementer types that would be capable of taking on your replicated venture along with the reasons why each would be suitable.

## roles and responsibilities

### CENTRE

What roles and responsibilities will you, the originator, have? If you are replicating using an Association or Federation model and are creating a new Centre list the roles and responsibilities the Centre will fulfil below. Use the list below as a starting point.

**ORIGINATOR/CENTRE**

Systemise venture

* How much should be set by the originator vs. open to local adaptation?

Recruit, train and support implementers

* How will new implementers be found and assessed (if at all)
* What training and support is required to enable the implementer to fulfil their role effectively?

Marketing and brand

* What marketing should be done centrally vs. locally?

Business systems development

* What business systems are already in place?
* What additional business systems will be required to enable the implementers to fulfil their role?

Data analysis and research

* What information needs to be collected centrally?
* How will this data be analysed and reported?

Advocacy

* What advocacy does the originator need to do? What information is needed to enable this?

Programme innovation and development

* How will the programme be updated and developed?

Central contract negotiation

* Will contracts or funding be secured centrally?

Legal structure

* (If necessary) what will the legal structure be with implementers? What does the originator need to do to uphold this structure?

### IMPLEMENTERS

What roles and responsibilities will your implementers have?

**IMPLEMENTER**

Local implementation

* What is needed to do this? E.g. people, skills, premises

Local finance/resource sourcing

* What funding/income is required?
* Is the implementer responsible for sourcing this? What are the potential local income sources?

Local innovation and adaptation

* How much should the venture be adapted for a local context?
* What is the implementer’s role in this adaptation?

Local representation, networks and advocacy

* What local relationships are required for successful implementation of the venture?

Local marketing

* What local marketing is required? To which audiences?

Local data and research

* What information anddata needs to be collected at a local level?

## implementer profile

Detail the following aspects of your implementer profile.

### EXPERIENCE REQUIRED

### QUALIFICATIONS OR ANY STATUTORY REQUIREMENTS

### VALUES REQUIRED

### INFRASTRUCTURE/EQUIPMENT REQUIRED

### OTHER

## support structure for replication

Building on the roles and responsibilities exercise completed above, create a detailed plan of how you will support your Implementers to implement your venture in their local area. Then list the additional infrastructure that you will need to be able to fulfil your roles and responsibilities listed above.

### INITIAL SUPPORT AT START UP

### ONGOING SUPPORT

### ADDITIONAL INFRASTRUCTURE REQUIRED TO FULFIL ORIGINATOR/CENTRE’S OBLIGATIONS

# FINANCIAL MODELS

## PROJECTED IMPLEMENTER P&L

Use the financial models created in Excel to create and insert a Profit and Loss (P&L) sheet detailing projected income and expenditure for the first three years of an Implementers lifetime. Insert that P&L here.

You should take care to justify why you think the levels of income and costs you have detailed are appropriate. Being unrealistic at this point is likely to jeopardise the success of your replication efforts.

## NEW IMPLEMENTER START UP COSTS

Summarise implementer start-up costs and how implementers will be able to access the finance needed to get started.

### STRUCTURE OF INITIAL SUPPORT PACKAGE

The Initial Support Package includes the goods and services that the Centre will provide for all the Implementers during the start up period. For the (Organisation’s name) network, this will include the following:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **(Organisation’s name) Initial Support Package Summary** | | | | | |  |
|  |  |  |  |  |  |  |  |
|  | **Support Package Breakdown** | | | |  | **Amount to be charged to implementer** | **Cost of providing support to Centre** |
|  |  |  |  |  |  |  |  |

### ADDITIONAL COSTS

Insert a table below showing the additional estimated start up costs for a new Implementer e.g. vehicles or equipment that they will have to source themselves.

## PROJECTED CENTRE P&L

Use the financial models created in Excel to create and insert a Profit and Loss sheet detailing projected income and expenditure for the Centre for the first three years of the replicated network. Insert that P&L here.

## ONGOING MONEY FLOW

### RATIONALE

Detail how money will flow between parties and the rationale for this.

# governance

Describe your anticipated governance system for your replicated network.

# marketing

### MARKETING REQUIREMENTS

What marketing requirements will your replicated network have?

### BRAND GUIDELINES

Which brand(s) will be used across your replicated network and how?

# monitoring and evaluation

In this section detail your plans for M&E.

### OBJECTIVES

Describe your objectives for M&E in the context of an expanding network.

### DATA COLLECTION

What data will you collect, how and when?

### QUALITY STANDARDS

What are the key quality standards you will use to assess your networks performance?

### IMPLEMENTER IMPROVEMENT

What steps will you take to improve the performance of implementers if they do not meet your targets and standards?

# exclusivity requirements

Detail any exclusivity requirements to be used when recruiting and managing implementers.

# legal issues re franchising

## INTELLECTUAL PROPERTY

### Trading Name of the Replicated Network

What name will your replicated network trade under?

### Trade Mark Registration

Detail any trademarks you have registered.

Insert Logo

Mark text: (Organisation’s name)

### Status

Status:

Classes:

### Relevant dates

Filing date: Next renewal date:

Registration date:

## LEGAL STATUS OF IMPLEMENTERS

Define the legal status that implementers will have and why.

## INSURANCE

Detail any insurance requirements for implementers.

## NEW company TO ACT AS THE CENTRE

OftenOriginators will establish a new company or charity to act as the Centre and issue the agreements with affiliated Implementers. This is intended to protect the existing companies from litigation from Implementers in the event of a dispute.

## GOVERNING LAW FOR FRANCHISE AGREEMENT

Which key legislation will your replicated network be subject to?

## TERM OF THE FRANCHISE AGREEMENT

What will the term of any agreements be and will they include the right to renew the franchise agreement?

## Minimum income requirements

Detail any minimum income requirements.

# preparation and fundraising

## Activities

What key activities need to be undertaken in order to prepare for scale?

## Cost

How much will these cost?

## Timeframe

How long will they take to implement?

## POTENTIAL FUNDERS AND/OR INVESTORS

Who can you approach to help you to finance your replication?

# CONClusion and recommendations

Based on your work carried out as part of completing this development report, summarise your findings and recommendations. We recommend discussing these with key management figures and developing a plan for securing wider buy in.