

**SOCIAL ORGANISATON REVIEW**

* Date
* Name of Organisation
* Contact Name
* Position

# THE ORGANISATION

* Legal status (Company, Partnership, Sole Trader etc)
* Trade Mark registration details (give details of what is trademarked?)
* Organisational objectives
* Governance structure (Board formation & description)
* Management structure (senior management roles)
* Number of employees

# PROJECT

* Project objectives (goals of the project, why looking to scale, how are you creating social value?)
* Project team (who is the lead, who makes up the team, team profile)
* Project activities (description of main products/services that the organisation provides)
* Number of beneficiaries served annually
* Details of major supplier contracts

# CUSTOMERS

* Typical Customer/Client profile (give details of your typical customer)
* Target Customer/Client profile (give details of your target customer)
* Dealing with customers (is it you or the implementer who deals with the customer?)
	+ Who will have initial contact
	+ Who will set the selling price
	+ Who will invoice customer
	+ Who will collect the money
* Pricing guidelines (how do you price your products/services?)
* Description of current demand creation activities (details of advertising/promotional activity)
* Seasonality (is seasonality an issue for your business workflow, if so, how?)
* Customer complaints procedures (how do you deal with customer complaints?)

# FINANCIAL

1. **Originator (you/current project)**
* Project revenue (government contracts are included) source & total figures
* Philanthropic income source & total figures
* Other income sources source & total figure
* Total financial year income forecast
* Funding timescales (grant funding – how long are the grants secured for?)
* Reporting requirements
* Cost breakdown
* Profitability of products/services
* Accounts – audited (are your accounts audited and by who?)
* Anticipated ongoing income stream/s - give sources of expected income e.g. Fee from implementer (franchise fee), marketing, brand, product sales and give % breakdown.
1. **IMPLEMENTER (THE PERSON OR ORGANISATION WHO RUNS YOUR REPLICATION)**
* Start-up costs (give brief breakdown for start-up costs involved in replicating this project)
* Intellectual Property - Trade Mk/Agreement/Territory (give details of any IP costs involved)
* Induction Training (number of days and how much would this cost?)
* Ongoing costs
	+ Marketing
	+ Stationery
	+ Equipment details
	+ Shop-fitting details
	+ Office Items
	+ Other start-up costs

**If you have replicated previously**

* Financial forecast (if possible) - give a financial forecast for the implementer
* Anticipated margins (if possible) - what margins should the implementer expect?
* Fees collected from franchisee in the past
	+ Amount
	+ Process for collection
	+ How fee structure was determined

# MARKETING

* Key brand values to implementers/end-clients
* Brand management (how is the brand being developed?)
* Brand guidelines
	+ Any documentation available?
	+ Responsibility (Agency details if there is one)
* Market Positioning (how is the organisation positioned in the market)
* Advertising & promotion activity (give details how is advertising done)
* Sales techniques & training responsibility (how do you sell and is there any sales training been provided?)

# MONITORING AND EVALUATION

* Systems: What data collection systems do you currently have in place?
* Data type: What sort of data is being collected, including the main impact and outcome measures?
* What data collection methods are you using? For example, clients records, internal QA audits, customer surveys, financial records etc.
* Have any external evaluations been carried out? Please detail/provide any reports.
* Have you used comparison groups or complex evaluation techniques e.g. randomised control trials, cost benefit analysis or SROI? Please detail/provide any reports.
* Data collection: How regularly do you collect data?
* Data storage: How is data being stored?
* Data analysis: How is the data being analysed?
* Data usage: How is the data being used?
* How significant are the outcomes for beneficiaries? How does this compare to similar interventions

# SYSTEMISATION

**Have you documented your current policies and procedures?**

* Client management procedures
* Quality control standards and procedures
* Procurement policies
* Marketing material
* Training manuals
* Accounting systems
* Communication systems
* Information technology
* Job descriptions roles and responsibilities
* Child protection
* Health & safety standards
* Stock control required for day-to-day operation
* Cash handling/banking
* Book-keeping
* Communication & reporting by Franchisee to Franchisor
* Purchasing from nominated suppliers necessary
* Credit control
* Add/delete as appropriate

# ADDITIONAL NOTES