EXAMPLE COMMUNITY BUSINESS DASHBOARD

Plunkett UK

VISION: A café that brings the community together
MISSION: Bringing people together through healthy food, care, and community

KEY PARTNERS

Parish Council
Village Hall
Local suppliers and producers

KEY ACTIVITIES

Employment, training
Free Wi-Fi and space for community groups
Access to services: Pop-up post office, library etc
Volunteering opportunities
Quality food and drink
Welcoming new people to the village
Befriending and connecting
Community lunches

COMMUNITY VALUE PROPOSITION

Reduce loneliness and build a stronger, more connected community by creating welcoming, inclusive, safe space and event

Make locally sourced food & drink accessible and affordable

Reinvest surplus into projects that improve local wellbeing

CUSTOMER RELATIONSHIPS

We aim to be hospitable to our customers and befriending and connecting them with others.

The local community are our priority and making sure all feel included and welcome

PEOPLE WE SERVE

Local residents, specifically:

- Mums with young children
- Elderly
- Families
- Those who work from home

Missing group: teenagers

SHAREHOLDERS

Annual survey (email)
AGM / Annual celebration event
Monthly newsletter
Invites to shareholder events

KEY RESOURCES

EPOS
Café building
Portable coffee station
Volunteers: Café / back-office / Committee
Storage
Welcome packs
Cook (paid)
Manager (paid)

CHANNELS

Pop up café at village events
Facebook / website
Parish Mag
Direct comms via email
Schools
Church
Village Hall

RISKS

1. Key staff leave
2. Building sold by owner
3. Low footfall in bad weather

COST STRUCTURES

Rent of café
Manager and Cook
Ingredients and food & drink for resale
EPOS
Utilities
Team uniforms and training

REVENUE STREAMS

Café weekday mornings
Hire of café space by community (reasonable prices)
Essentials shop
Dry cleaning collection
Evening Events at the café
Saturday breakfasts

How To Interrogate the Community Business Dashboard to Make Decisions and Do Quarterly Reviews of Your Business

Example 1

Making a decision about whether to start opening on a Sunday

1. Start at the Community Value Proposition box: will opening on Sundays enable you to achieve this or will it distract you from it?
2. Then, ask how it would impact each section:

- Would it help to build relationship with our community?
- Would it serve our core people?
- Is this to generate income, if yes, then would it? If no then is it a key activity that brings value to our community? If both no then why are we doing it?
- Would we need additional resources to do it? Yes, volunteers. Can we provide those resources?
- Are there additional costs attached? Can we fund these? Or does the revenue cover these + a profit? Or could it reduce our wastage so save us money?
- Who could help us make this work?
- Have we asked our shareholders what they think?
- What are the risks?
- How would we need to tell people about it? Does this have extra cost?

3. Review all the facts from this and then make decision
4. Add in a review for the quarter

Example 2

Issue with turnover

1. Start with Revenue Streams: which area biggest issues / lowest revenue generators / seeing a drop in income? Are we providing what our community actually want?

2. Channels – are we telling people about it enough? Are we communicating in a way they will hear it? Have we listened to them? What did they say?

- What cost structures impact it? Can we check those?

-Have we engaged the community about it?

-Has our footfall reduced? if so, who is not coming in? Look at People We Serve.

Example 3

A problem has occurred, e.g: your Manager has announced they're leaving

Hopefully this was one of your top 3 risks already as you had known they were either not happy, or they've given you notice because they're moving away.

1. Identify what is **not** affected by this? E.g: Community Value Proposition

2. Identify which area this will have most immediate impact on? E.g: Key Resources (volunteers)

   - What do we need to do / put in place to limit upheaval? (keep them informed and listen)
   - Which partners need to be informed / could help us recruit? Who else needs to know? How do we communicate this?
   - Look at Revenue and Cost Structures to see what opportunities this brings: less or more hours, shared role next time so the risk reduced etc
   - What other risks does this change? How do we mitigate those?
   - Are there any key activities we'll need to stop or pause?

Monitoring and Planning – Monthly Questions and Quarterly Reviews

What to ask the Dashboard every month

- What have we done towards our Community Value Proposition?
- Have we seen all groups of our customers from our community?
- Did we: a) send out the newsletter, b) hold the events etc

Use it to do a Quarterly Review – look at each section using the examples below

This could be a way to share responsibilities in committee and identify ways to engage other volunteers. Plan for the next quarter pro-actively: what do we want to try this quarter to meet our goals?

Use it to examine your Revenue Streams (link this to your management accounts)

- Look for patterns in your management accounts and forecasts
- Identify the biggest issue and / or what needs to be monitored
- Review each revenue stream in a way that aligns with our values and keeps the business sustainable
- Are we promoting all the revenue streams?
- What do we want to try in response to the issue? New revenue streams, different supplier etc
- Are there revenue streams that we want to plan for in response to a survey?
- Maybe add Turnover for last ¼ or GPM as a measure (set target)

Use it to review your Cost Structures (related to information provided by management accounts)

- What are the biggest costs this quarter? Where they what we expected?
- Choose one line to look at in detail this quarter and deep dive into it
- Are these things working most effectively?

Use it to review how you work with Partners and if its effective

- Which supplier / partner do we want to meet with this Quarter? What do we want to get out of the meeting? How did the last conversation go? Is it working?
- How are our other partner relationships? Any concerns, anything to promote? Any new ones, any to let go – any holding us back from our purpose – e.g: not local, don't understand our ethos.

Use it to review the People We Serve

- Have we seen all the diversity of groups that exist in our community come in as customers?

- Who can you name that is engaged from each customer segment? Who is missing? Who are we not including? Inclusion drives up footfall and volunteers.
- Is there a specific section we want to engage more? How do we pro-actively reach out to them instead of waiting for them to come to us? Is there a club, venue, society or cultural moment we can participate in to talk to them about our business?
- What are our footfall numbers? Is this going up or down?

Use it to review your Customer Relationships

- How did we prioritise our community last Quarter?
- What's stopping our space being hospitable? Ask different people to 'test' the experience of using your business and give honest feedback. Does there need to be a seat by the door for those who can't stand for a long time? Are signs large enough to read? Do you advertise your inclusive approach?
- Have new volunteers been trained well? Do people get a smile when they come in?
- Do we have testimonials telling us they have felt welcome? Seek out those missing people and do the uncomfortable work of asking what you need to do to make your business welcoming for them.

Use it to review your Channels

- When did we last listen to our customers / community? Has the community changed or grown?
- What opportunities are there to engage them / for them to get involved going forwards?
- What response / engagement are we getting to our communication? Socials insights?
- Which channel has been most successful and why?
- Actions: add one to try if decide you need to communicate more effectively, or highlight one method you want to improve
- Did we consult them in decisions?
- Did we tell people about our revenue streams?
- Are these methods working with all the people we serve?

Use it to review your Key Activities

- Are we actually doing the activities we said we would?
- How do we know we're doing these well?
- Are they costing more than we can cover through income?
- What testimonials do we have about the impact of these?
- Focus on 1 or 2 per Quarter to focus on
- Are we doing what we said we would / what the community needs now?

Use it to review your Key Resources

- Look at expenditure
- Is there a resource that's not meeting it's purpose?
- Is there a lack of resource / difficulty that's stopping us achieving our goal?
- How should we respond / prepare for e.g: volunteer numbers reducing / EPOS crashing
- Pick main one and really think it through this Quarter.

Use it to review your Risks (link to risk register – monitor specific area quarterly)

- Any changes to risk? What are you going to do?
- Any new risks?
- Put top 3 each Quarter.