

PLANNING: Making it work for you

What is it exactly?

- The art of planning is to define where you are going specifically, how you are going to get there and who is going to help you along the way. It is turning your aims into action. Aims are useless without action.
- A good plan is both a route map and a reference point. As a **route map** it is specific about what action should be taken by when (your milestones) so that you know whether you are going in the right direction. As a **reference point**, the plan allows you to assess whether you have made a difference by doing what you said you would – it provides a check for monitoring and evaluating your progress, and changing things if you need to.

“The secret of getting ahead is getting started. The secret of getting started is breaking your complex overwhelming tasks into small manageable ones then starting on the first one.”

Mark Twain

Why does it help?

A plan helps you

- know if you are there yet, and recognise it when you are
- know if you have taken a wrong turn – or found a better route
- tell others what they are meant to do to help and helps them understand how they fit into the overall picture
- prioritise – are you doing something that will help you get there and if not why are you doing it?
- tell your story to others – if you know where you are going, and how you are going to get there, it is so much easier to share with others

Key principles

Planning a project

Never overcomplicate your project plan. There are five key elements

A) Define the objectives

Make sure you are each clear on what you are trying to achieve as a group.

When you define your objectives, make sure that if you achieve all of them you will have completed your project successfully.

Make sure your objectives meet the smart rules – specific, measurable, achievable, realistic, timed.

For more on smart objectives visit the planning Stepping Up Guide on www.glossteppingup.org

B) Create an action plan.

Define what needs to be done in order to achieve the objectives. Break this into sensible chunks and agree what will be done by whom and by when. Fix your key milestones.

Agree in what order the tasks need to be done, if one needs to come before another....and which tasks are linked (you can't allocate the goods and deliver them to the right people if you haven't bought them first)

Make sure that when you allocate tasks, people have the capacity (enough time) and capability (the right skills) to achieve them and have any other support they need.

Make sure everyone is clear what they are responsible for, how that fits with the whole and who they report to. Make sure there is only one person ultimately in charge (the project leader).

If you need cash, or any other funding for any of your project, prepare a budget plan in line with your action plan. Make it clear what cost is allocated to which part of the action and who is responsible for managing and reporting on the spend

C) Make actions that are linked clear and publish these inter-dependencies

Make any actions that are dependent on others very clear e.g. you can't paint walls if you haven't built them yet... Ensure this is clear not just to those who are responsible for doing the work but all those involved and who may be affected if there is a problem.

D) Agree and make clear key milestones

There are always some critical points or times in your project which if you miss will mean that it puts your project in jeopardy. These are your key milestones. Recognise what these are upfront and build your action plan around them.

This could be a deadline for a fund bid, a time by which you must provide services, or a point after which you will not have people available to do the work.

E) Monitor action against your plan regularly and assess risks

Review your plan regularly. Use your judgement. Are you delivering against your plan? If not, why not and how can you get back on track?

Will a slip in time or budget matter at this point, or if an action is implemented differently to the original plan will it make a real difference? If it does, how will you adjust to fix the problem? Is it a better way of doing things? Can you apply the learning elsewhere?

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Brainstorm regularly (each project team meeting?) which parts of your plan are most likely to go wrong, and how important it will be if it does. If it is very important (high impact), and very likely, brainstorm what you can do to fix it if it happens. This is your risk assessment.

Good communication is essential to running a project well. Don't over communicate – too much is as bad as too little (people stop listening)

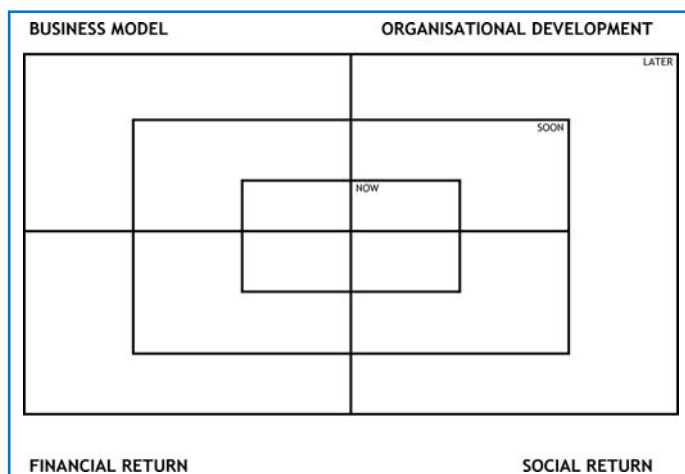
Make sure you do tell the right people the right things at the right time. Update your plans to reflect any changes and make sure everyone who needs to know is aware of the implications.

Planning to present to potential funders

There are many ways to present your organisation to funders and many demands from them as to how and in what format you do so. The 'balanced scorecard' could help you to break your plans into four key pieces, help you to ensure you have thought through each properly and having done so build a coherent story for each piece that will go a long way to persuading funders of the worth of your organisation. It allows you to look at your plan

- a) **now** – as your organisation stands;
- b) **soon** – a date to be picked as appropriate by you e.g. a year (or shorter) if your organisation is changing rapidly or in crisis, or three years if your organisation is very stable and
- c) **later** – your vision for the long term; where are you really trying to get to?

The four components on the scorecard are:



The Business Model

What products are you making or service are you offering and who are you offering these to (who are your customers and/or beneficiaries)? What are your pricing policies? Who are your

competitors and what are you offering in comparison to (above) them? What is in place to make your organisation known to the right people?

Organisational Development

What kind of organisational structure do you have, how many people, what kinds of skills, how many volunteers, what does your management committee look like, what kind of quality systems are in place, partnerships? What kind of premises do you have? How will these need to change?

The Financial Return

What is your turnover, what proportion is earned income for which part of your product or service, what other funding can be allocated, what assets or reserves do you have? What is your prediction for this over the soon and later time periods?

The Social Return

What is the benefit that will result, for whom? Clarify this in terms of your expected outcome of what you are doing and what impact will this have on which problem (social, economic, environmental, or cultural) you are addressing? What difference will it make for the beneficiaries themselves? Have you/ can you look at social return on investment?

Find the balanced scorecard and a checklist of hints and tips within the planning Stepping Up Guide on www.glossteppingup.org or on www.communityst.co.uk

Planning a new part of your organisation

Are you finding funds tight? Looking for new ways to generate revenue? Finding that your organisation needs to refocus in a different way?

The Business Ideas Generation (B.I.G.) framework that the Development Trust Association has created may be able to help.

The framework has been designed to help those who

- Don't have an idea yet
- Have several ideas, but can't choose which one to concentrate on
- Have a good idea but want to strengthen it
- Have an idea but are not sure whether it is a business
- Are not sure if an idea suits
- Have a vague idea and want to develop it

Visit www.communityst.co.uk to download the full framework, or find it within the planning Stepping Up Guide on www.glossteppingup.org

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Dos and don'ts

- Plans should never be static – use them. If they don't help, they are the wrong plan. Change or update them.
- Communicate the plan to everyone who needs to know. Understanding the part you are playing in the whole is a great motivator.
- Agreement is not the same as commitment. Make sure you have the right people doing the right jobs and that they are fully on board.
- You will never get where you want to go, if you haven't clearly defined where that is first
- And define it in enough detail. You can 'help people' in many different and contradictory ways.
- Don't kid yourself – if what you are doing doesn't help you get where you are going, don't do it.
- A plan is worthless with no action. Action is at least 80% of achieving something.
- All action with no plan wastes effort and resources. Teams can work against each other, while all trying to do good things.
- A plan is even more critical if you are working with, or across, other organisations.
- Be realistic – don't set yourself up to fail. Aim high, but know how you can get there.
- Don't develop a plan in isolation – make sure all the key players are involved in the process.
- And that they understand it when it is written down. Don't use complicated software when a piece of paper and pencil will do.
- If you need to change direction, make sure you remember why you were doing what you were doing in the first place – what is important is that you make the difference, not that you follow an action list.

The next steps

Go to www.communityst.co.uk for access to the balanced scorecard or B.I.G. materials

If you would like help with your planning processes, contact jane.grindey@co-operativefutures.coop.

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Send feedback to: jane.grindey@co-operativefutures.coop



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