

Just One of Tom Little's BIG Ideas



The Importance of Planning

Plan the work.

Work the plan.

Monitor and evaluate the work against the plan.

The Importance of Planning

“We don’t have time to plan.” You may have heard these words. You may have uttered them yourself. Unfortunately, if you don’t plan, you do so to the detriment of your organization. Why? When you don’t plan, you cannot make the most of the resources at your disposal. You also can’t avoid the pitfalls many organizations fall into.

Planning makes you better. And in the end, planning saves you time.

Plans fall into two categories, strategic (longer term – 3 to 5 years), and operational (short term – 1 year). All good organizations have both.

Strategic plans should be created with as much input as possible from all the organization’s stakeholders. One approach used by many community agencies is to circulate questionnaires to all stakeholders – consumers/customers, staff, Board, funders, and community partners - and to complement the input received by hosting in-person focus groups made up of a representative sampling of each stakeholder group.

Ideally, the plan has two sections, one for the Board and its governance work, and one for management and staff, related to operations.

Once they have a strategic plan, Boards and CEOs/Executive Directors both need year plans to determine what they will do over the next 12 months to move in those directions, while also paying attention to day-to-day issues.

Boards should have their own yearly action plans that tie to their section of the strategic plan. As stewards of the agency, Boards need to ensure their own effectiveness, comply with a wide range of legal and financial requirements, act as ambassadors and advocates, liaise with funders, foster the agencies’ membership, and undertake discretionary tasks such as developing partnerships and fundraising.

Management should create one-year action plans that detail what will happen related to clients/customers, services (and products), staff, facilities, finance, and management and administration. Each department should have its own sub-plan. The yearly action plan should include a budget.

Together, strategic and operational plans comprise an organizational roadmap. They provide everyone with a common understanding of where the organization is going, and how it’s going to get there. In the course of being developed and approved, the plans offer a forum for discussion and debate. They invest everyone in making the future a reality. And they ensure there are no surprises as the years go on.

The individual year plans also allow Boards and CEOs/Executive Directors to monitor their work through the year, to adjust their goals as needed, and to evaluate their performance when the year is over.

Year plans don't have to be overly long or complicated. Just remember one thing – the actions set out in them should be concrete and measurable.

Year plans are made even better if you start the process by reviewing your organizational results over the previous 12 months. So doing also provides you with a permanent record of what you have accomplished year by year. It acts as a morale booster. For some reason many non-profits focus on the problems confronting them, without taking time to reflect on all the good things they have achieved.

Conducting a review in conjunction with yearly planning also provides a built-in evaluation process. As such it can be the basis of the Board's evaluation of its own performance and of the performance of the CEO/Executive Director.

As with the strategic plan, the Board and CEO/Executive Director should involve stakeholders in the creation of yearly action plans, as time allows. Boards can invite input from the CEO/Executive Director and management, and the CEO/Executive Director can involve not just the management team but through it some or all other staff.

Yearly action plans should be completed in the 3 months prior to the start of the year. Management should forward its plan to the Board before the end of this period for information (and sometimes approval depending on where final decision-making authority lies). The Board should ensure the Management plan and its own plan complement each other.

Once the plans have been approved, implementation should begin on the first day of the new fiscal year. Approval gives licence to all parties to undertake the actions the plan contains, without needing to seek permission again. This streamlines the day-to-day operation of the organization by ensuring nothing gets revisited unless something significant has changed.

The key to an action plan is implementing it. To make sure this happens, management team members in particular must use the plan to guide their day-to-day actions. In addition, the person who supervises them (usually the CEO/Executive Director) must use it as the basis for discussing and monitoring the work of the managers and of their departments.

This is the reason each management team member meets monthly with his or her immediate supervisor. In preparation, each manager forwards a brief summary of the last month's actions and achievements to her/his supervisor 2-3 days in advance of the meeting. Actions for the next period and changes to the plan are also noted. Discussion is a two-way street and includes ways the person doing the supervising can support the management team member in completing the actions and achieving the targets.

As long as everything is on track these meetings can be short. At the same time, if something isn't going according to plan, it can be discussed and changes made, subject to approval by the CEO/Executive Director as needed.

Managers can also prepare a list of incidental things to talk over at the monthly meetings with their supervisor. This is an effective time saving device, since it avoids the need to catch the supervisor for 5 minutes here and 10 minutes there over the course of the month. The truth is that most issues can wait until that next meeting.

For the management team, it is imperative that these monthly meetings take place. Prepare a schedule for the year and insist that they happen – no exceptions!

At the end of the year, the managers and the CEO/Executive Director produce a report containing a list of the actions completed and targets met, along with accomplishments which were not part of the plan, and actions that were not completed and targets that were not met. Most organizations achieve more than they plan, so this usually results in an opportunity for the management team to give themselves a pat on the back.

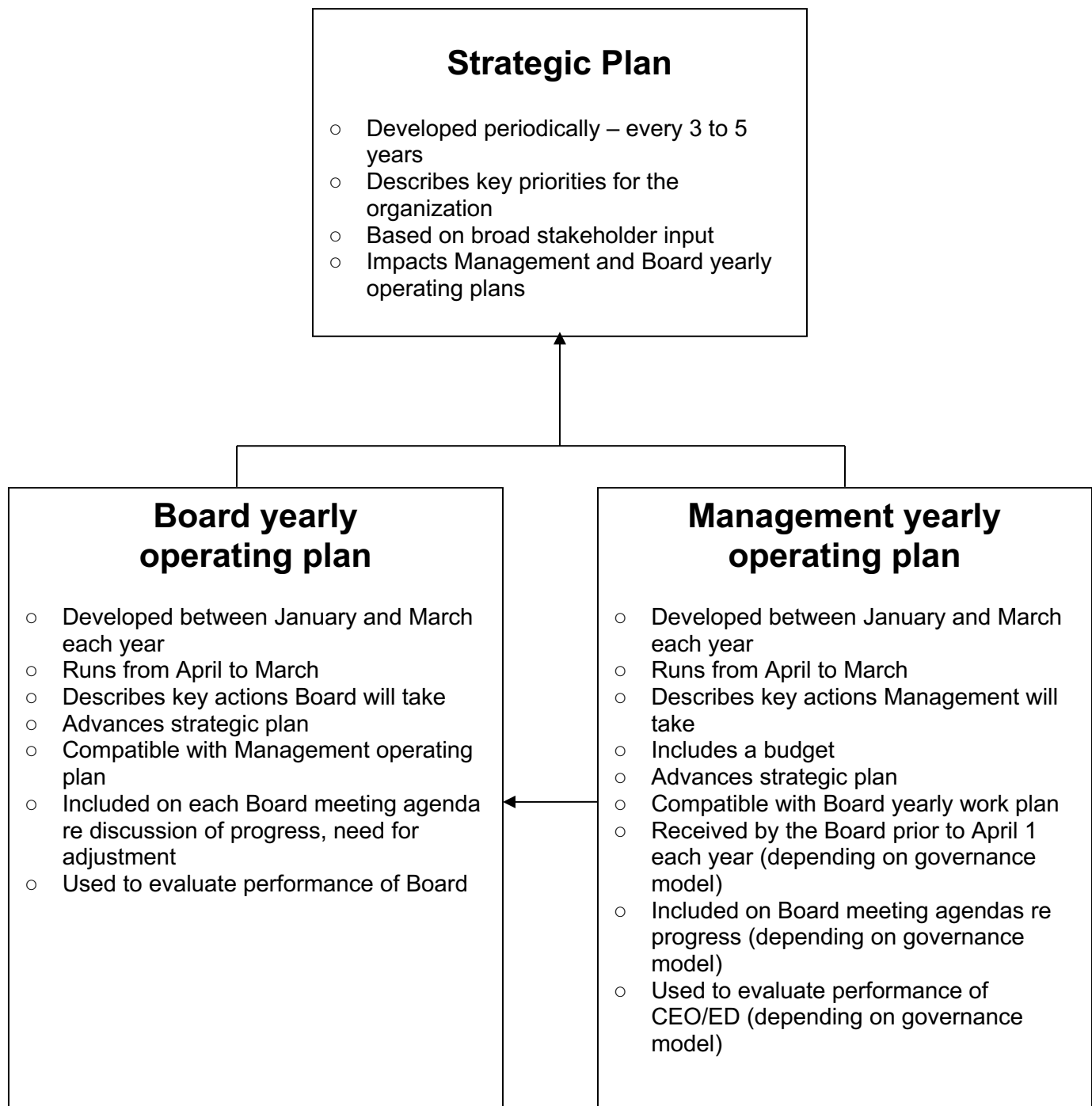
Boards need their own implementation and review methodology. These include ensuring the plan is on the agenda for each meeting, that the Board reviews its accomplishments at the end of the year, and that it evaluates its performance based on how well it did in meeting the targets.

Taken together, strategic and yearly action planning are a long-term commitment to an important organizational tool, and warrant investment of time and effort. Strategic and year plans help ensure the organization runs effectively. They bring the added benefit of ensuring the accountability of the CEO/Executive Director to the Board of Directors, and of the Board to the membership, funder, and the community.

Governance and management by planning – we recommend you endorse this principle as your organizational cornerstone.

Planning Schematic

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About Tom Little & His Big Ideas

Tom Little started out as small as his name. Even smaller maybe.

Over time though, Tom Little got big. Six foot four. Two hundred and fifteen pounds ... maybe two twenty ...two twenty-five absolute tops, but only when his love of butter and orange juice starts creeping towards addiction.

So, when Tom Little has an idea, it's automatically a BIG idea. But that's not the only reason.

Tom has spent his career working for, and with, non-profit organizations. That exposure, first as an executive director and then as a purveyor of non-profit knowledge (you might use the term "consultant"), has given him many insights into how these strange and wonderful creations operate.

Along the way his colleague Nancy Collins joined the fray, bringing acuity and youthful enthusiasm to complement Tom's years (Nancy describes them as many, many years) of experience.

Tom Little's BIG Ideas are intended to help you make your non-profit better. Primarily focused on management and Boards, they appeal to anyone involved in the non-profit sector.

You get full access to Tom's BIG Ideas when you call on him for assistance in planning, evaluation, research, and training.

Non-profit organizations are built on ideas. The better the ideas, the better the organization. Tom provides you with the best ideas available!

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