

## What is Organisational Planning?

It is the process by which an organisation creates a clear, compelling picture of its future and then puts in place the necessary procedures and actions to achieve this future.

## Why plan?

There are a number of reasons for an organisation to undertake an organisational planning process that results in the development of a strategic plan. These include:

- **Focuses the work and resources of the entire organisation.** It can create a clear, compelling vision that the team and board understand and wish to work toward achieving.
- **Identifies the real needs of clients.** A sound planning process always involves getting input from clients to ensure that their actual needs are known and acted upon. This also puts the organisation in a better position to understand how it could expand or enhance its services.
- **Reveals what should no longer be delivered.** The organisation needs to recognise what it needs to stop doing in order to be more efficient and client focussed.
- **Legitimises the work of the organisation.** A well-articulated plan demonstrates to the public, funders and key stakeholders that the organisation is making the best possible use of its resources to the benefit of the clients whom it serves.
- **Provides a roadmap to chart the organisation's progress.** It should be utilised by the board and team on an ongoing basis to make decisions and measure progress toward achieving the plan's results or outcomes.

### What are the critical elements of a plan?

While the specific elements of an organisational plan will vary, the critical "strategic" elements will be:

- ✓ The mission (the "business" the organisation is in)
- ✓ The vision (the desired future of the organisation)
- ✓ The organisation's strengths and constraints
- ✓ The critical internal/external challenges and opportunities facing the organisation
- ✓ The goals to achieve the organisation's mission

## What does Organisational Planning actually involve?

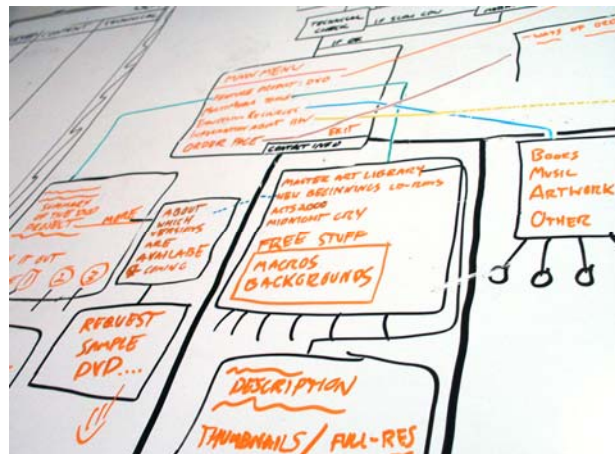
There is no one-size-fits-all approach to organisational planning but here is a 5 step process you may find useful:

### 1. Get Ready

Prepare: decide on the process you want to take and the timescales. Form a planning group and divide up tasks.

### 2. Clarify your organisation's purpose

Consider your vision, mission and values: what your organisation is going to be like and how it's going to act. Consider the impact and outcomes organisation wants to make. Analyse and build your knowledge of your user group.



### 3. Open up options and choices

*Look internally:* consider the organisation's strengths, weaknesses, competencies and capacities. *Look out:* consider how external trends and issues will influence how and to what extent the organisation can deliver its mission to the future.

### 4. Make decisions

Refine options for the future and discuss them with stakeholders. Develop detailed priorities.

### 5. Communicate, implement and review

Communicate your strategy internally and externally. Weave strategy into team and individual work plans. Track progress and judge its success in strengthening your organisation.

### Need more help to get started?

[www.strategy.impact.org.uk](http://www.strategy.impact.org.uk). Will help you to know, grow and show the difference you make. It provides an Organisational Needs self-assessment tool which could be a good start in your planning process

[www.3s4.org.uk](http://www.3s4.org.uk). Third Sector Foresight specialises in organisational analysis, helping you to identify and respond to current trends