Action Planning

OVERVIEW

This toolkit provides a model for taking an organisation through an action planning process. It takes the user through a basic action planning format, step-by-step, covering all the key elements. By following the format, any project or organisation should be able to prepare a comprehensive action plan, in the context of a strategic planning framework. The toolkit expands on the short introduction to action planning in the toolkit: Overview of Planning.

Action Planning

Introduction

Who should use it and when?

Welcome to this toolkit. It is an extension of the brief introduction to action planning in the toolkit: Overview of Planning.

Why have a detailed toolkit on action planning?

Action planning is the planning that guides your day-to-day work. Without a strategic framework you don't know where you are going or why you are going there. And then, it doesn't really matter how you get there! But without an action plan, it is likely that the strategic plan will remain a grand dream and you won't get there anyway! This toolkit aims to help you do detailed, useful action planning, and takes the user through a process that could be replicated in an organisation or project.

The toolkit that deals with an Overview of Planning will help you to see how action planning fits into the overall planning process. The toolkit on strategic planning will help you prepare for action planning. The toolkit on monitoring and evaluation will help you to expand on the process of monitoring and evaluation once you have carried out your activities. Good action planning, located within a clear strategic framework, helps your project or organisation to make a significant impact.
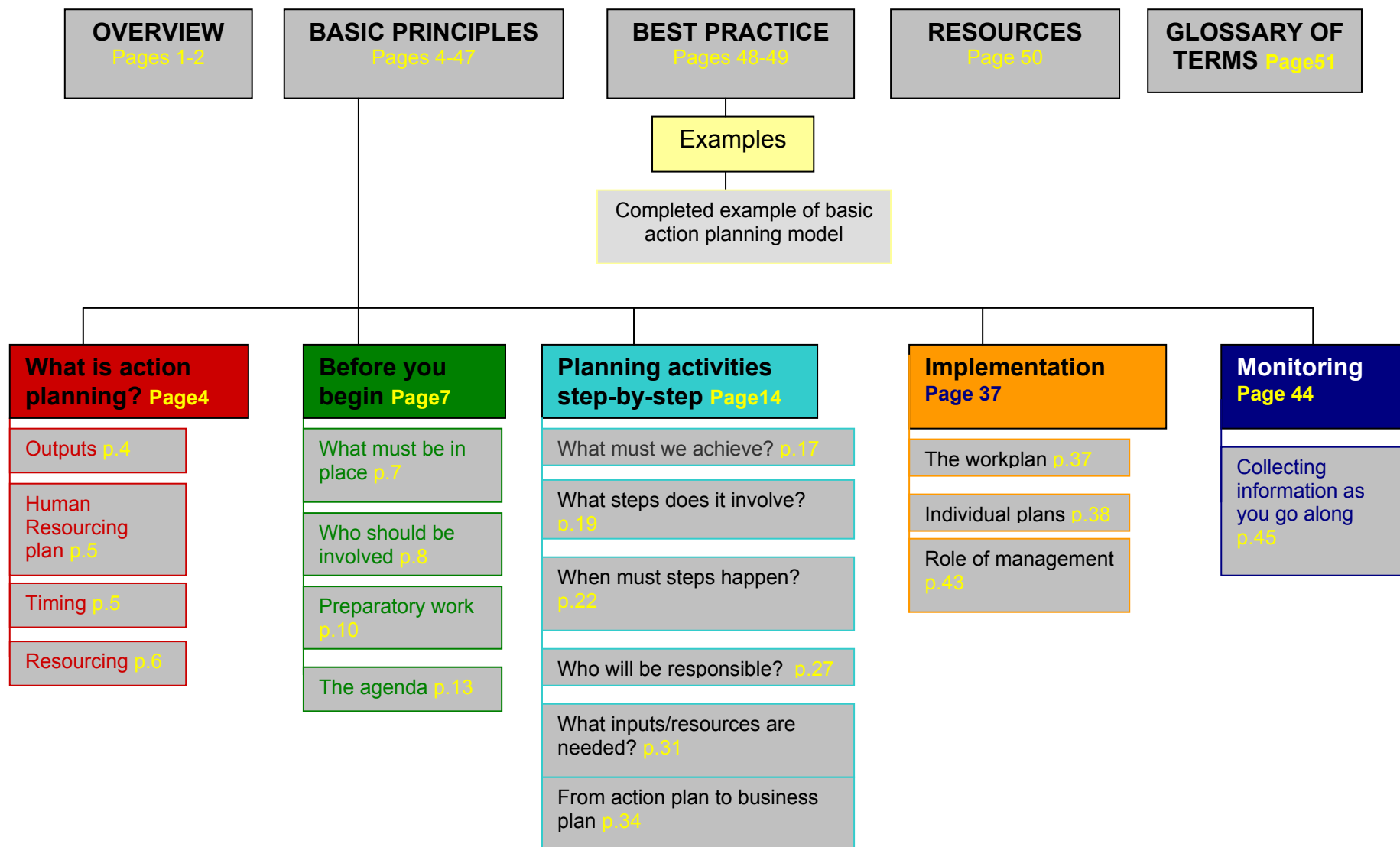
Who should use this toolkit?

This toolkit is for those who have had only limited experience in planning or in action planning. Perhaps you have not been involved in running an organisation, project or department before. Or perhaps you have not been involved in the planning side of the work before. Our experience is that many organisations and projects are actually very good at action planning; once they know what needs to be done, they can plan to do it. Problems arise when this planning is not located within a strategic framework and the organisation or project keeps "doing" without thinking strategically. For those of you who are still unsure of how to plan your activities, or feel unsure that you are "doing it right", this toolkit should be useful.

When will this toolkit be useful?

- When you need to plan operationally, on the basis of a strategic planning process, and to make a distinction between strategic planning and operational or action planning.
- When you need some ideas to help you develop an action planning process.
- When you are ready to move a new organisation or project from the strategic planning phase to the operational phase.
- When you feel you need to review your operational plans because, for example, your strategy has changed.

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Pages 1-2	Pages 4-47	Pages 48-49	Page 50	TERMS Page51

Examples

Completed example of basic action planning model

What is action planning? Page4	**Before you begin Page7**	**Planning activities step-by-step Page14**	**Implementation Page 37**	**Monitoring Page 44**
Outputs p.4	What must be in place p.7	What must we achieve? p.17	The workplan p.37	Collecting information as you go along p.45
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BASIC PRINCIPLES

What is action planning?

Action planning is the process that guides the day-to-day activities of an organisation or project. It is the process of planning what needs to be done, when it needs to be done, by whom it needs to be done, and what resources or inputs are needed to do it. It is the process of operationalising your strategic objectives. That is why it is also called operational planning. When an action plan or an operational plan are presented as the basis for a funding proposal, or for a loan application, or to get others to buy into a process or project in some way, they are often referred to as "business plans". (See the section later in this toolkit, From Action Plan to Business Plan.)

Most action plans consist of the following elements:

- a statement of **what must be achieved** (the outputs or result areas that come out of the strategic planning process);
- a spelling out of **the steps that have to be followed** to reach this objective;
- some kind of time schedule for when each step must take place and how long it is likely to take (**when**);
- a clarification of who will be responsible for making sure that each step is successfully completed (**who**);
- a **clarification of the inputs/resources** that are needed.

All of these are dealt with again in **planning activities step-by-step**. If you go through an action planning process, then you should end up with a practical plan to enable you to resource and carry forward the steps needed to achieve your objective/s and contribute to your long-term goal.

OUTPUTS

Outputs are those things which show that activities have successfully taken place. They are the results of the activities. So, for example, if an activity is to organise for tertiary insitutions to hold an open day in your area, then the output would be "a well-attended open day". Outputs are the "what" that must come out of activities if a result area is to be achieved and the strategic plan is to be successful. All the outputs together should lead to the achievement of the key result area at which they are aimed e.g. better qualified teachers.

The key result areas of your strategic plan become the goals of your action planning. It is useful to summarise the expected outputs for the period for which you are planning in an "outputs summary". This provides you with a quick progress checklist, a set of indicators against which to test the question: "Are we getting through the activities we have planned and are they producing the outputs we anticipated?" It also provides a good basis for progress reports to donors.

HUMAN RESOURCING PLAN

When you prepare your action plan, it can be useful to develop a human resourcing plan based on it. This is a summary of what you will need in human resource terms to carry out the planned activities. In this plan, you can include:

▪ staffing needs already addressed, additional staff or support required;
▪ capacity building needs in order to enable staff to carry out activities.

Again, this provides a useful summary and will help you to work out a time-frame for the planned activities. Clearly, if you need to build capacity, or employ additional staff, before you can carry out an activity, this will affect your scheduling.

It also provides a useful summary of the implications of your action plan at the human resourcing level. This will help you to operationalise your plans and will be a useful reference point for donors.

TIMING

There are two aspects to timing in action planning:

▪ When to do it; and
▪ How to plan the time needed to carry out your activities.

You need to do action planning as an extension of your strategic planning process. But you also need to do it regularly in between strategic planning processes and reviews. Action planning is something you do whenever you know what you want to achieve and you need a plan to spell out the activities required to achieve it. You may need to plan for a particular workshop, or plan for the work of a department over the next three months, or do an overall action plan for a project or organisation for the year. It is not usually a good idea to do detailed action planning for more than a year in advance. Changes in context, in strategy, in assumptions may require changes in what you actually do in the longer term.

When it comes to planning the time needed, the key is usually **sequencing**: doing things in the right order and making sure that you don't get held up because something that should have been done earlier hasn't been done, and is now holding up the whole process. So, for example, it is best to book the venue for a workshop before you send out invitations, and it is best to get the illustrations for a publication done before you take it to the printer. Don't leave consultation with a community until after you have decided what you are going to do in the community, and don't begin building a dam until you have had the engineer's reports.

You will find more about planning your time under Planning Activities: Step-by-Step later in this toolkit. When you have completed your action planning process, it is useful to do a summary of your time plan, as a checklist for you and for other stakeholders such as donors or beneficiaries. This will enable you to see at a glance when your busiest periods are likely to be and to prepare for them in advance. In the section on Planning Activities:Step-by-Step, when must steps happen? we suggest a way to summarise activities and time-frames.

RESOURCING

The resources you need to carry out an action plan include:

- people
- time
- space
- equipment

What all this usually means is **money**. Your budget will summarise the financing resources that you need in order to carry out your action plan. You cannot prepare a budget until you have an action plan. (See also the toolkit on Budgeting.)

In summary, then, action planning is the process in which you plan what will happen in the project or organisation in a given period of time, and clarify what resources are needed to make it possible.

Action Planning

Before you begin

Before you can begin the action planning process, certain things need to be in place. Most importantly, you need to have worked through a strategic planning process so that your action planning does not take place in a vacuum, without a framework. It is not enough to do something because it seems like a good idea. Your "doing" must be related to a clear strategy aimed at helping you achieve long-term goals and objectives.

WHAT MUST BE IN PLACE?

You can do action planning simply as a way of getting through tasks that need to be done. But you shouldn't! Action planning should follow on from strategic planning and should be related to a strategic framework or context. When action planning happens outside of a strategic framework, it tends to be a hit-and-miss affair – you might do something useful, but then again, you might not!

Before you begin an action planning process, the strategic framework for the work of your organisation or project should be in place. This includes:

- A clear vision of the kind of society you are working towards, and a clear understanding of the problems that are standing in the way of such a society being achieved.
- A set of values that express what you believe in and are the basis for what you are trying to achieve. These provide guidelines for how you work.
- A clear mission statement that states what your project or organisation does, how it does it, for whose benefit and, where appropriate, and in partnership with whom.
- An overall goal that rephrases the specific problems you are attempting to address as being a positive situation that you are working to achieve.
- An immediate objective or project purpose that expresses what you, as an organisation or project, intend to achieve in the short- to medium-term, as your contribution to the overall goal.
- Key result areas which give shape to your strategy for achieving your immediate objectives.

With all these strategic elements in place, you are well set for an action planning process that will operationalise your strategy.

(For more on the strategic framework, see the toolkit on *Strategic Planning*.)

Action Planning

WHO SHOULD BE INVOLVED?

Who should be involved in an action planning process?

For a breakdown of who should be involved at different stages across the planning spectrum, see the toolkit: Overview of Planning, Who Plans? The two key questions here are:

- Who should participate in the action planning process? and
- Who, if anyone, should facilitate it?

Who should attend?

Once the strategic options and goals have been decided (usually by the professional staff and Board), and agreement has been reached on how to organise the work, planning can be done in functional teams. These might be departments or units or projects or matrix (across functions) teams. (See also Glossary of Terms).

Firstly, the professional staff involved should clarify the implications of the immediate objective/s and the result areas where they need to make a contribution. Then the full operational team, including administrative staff involved, should do the action planning.

Why is it important to include all staff at this stage?

The more informed administrative staff are about the activities of the professional staff with whom they work, the more likely they are to do a good job. Think, for example, of the project adminstrator who often has to deal with stakeholders on the telephone, or to deal with crises while professional staff are out in the field. The more s/he knows about the work, the more helpful s/he is likely to be.

At another level, in order for project activities to take place, an enormous amount of logistical support is needed. In order for administrative staff to provide this support efficiently and effectively, they need to have an understanding of what activities are involved and how they fit into the bigger picture. Implementation is a joint effort between professional and administrative staff.

Do you need an external facilitator?

Usually, it is possible to do your action planning without an external facilitator, although you should never be afraid to ask for outside input or technical input if you think it is necessary. Provided you answer the key questions posed in the section on Planning Activities:Step-by-Step, you probably do not need an external facilitator. However, if you have had problems with action planning in the past, then you may need to bring someone in to prevent the following from happening:

- planning to do too much in too short a time;
- not planning your activities in enough detail;
- not working out time-lines to make sure that your sequencing and scheduling makes sense;
- not making it absolutely clear who has responsibility and authority for making sure that all the steps get done;
- not thinking through the resourcing implications rigorously (see Glossary of Terms).

Once teams/departments/units/projects have done their action planning, it is possible for individuals to do their own planning and they should do this with support from management.

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PREPARATORY WORK

Review

The review preparatory work that needs to be done before the action planning process focuses specifically on efficiency and effectiveness.

Efficiency is about financial, human, time and material resources invested in activities.

Effectiveness is about doing what you say you will do and what you planned to do.

In preparation for action planning, it is useful to review your previous record on efficiency and effectiveness and to look at ways in which you can improve your efficiency and effectiveness.

On the next page you will find a questionnaire you could use in preparation for an action planning process, to help you identify ways of improving your efficiency and effectiveness

Getting the facts

It may also be necessary for a team/department/project to make some factual enquiries before it meets to do its action planning. So, for example, the following key result area may have been defined during the strategic planning process:

All underqualified teachers upgrade qualifications in their subjects.

A matrix team (see Glossary of Terms) has been put in place to achieve the result. Before planning the activities necessary, the team decides it needs information about:

- tertiary insitutions that offer distance learning courses in the area;
- which subject areas are likely to be the most needed;
- what has prevented teachers from getting degrees in the past;
- how much, on average, courses of this kind are likely to cost.

The team delegates the task of finding the answers to these questions to certain members of the team and agrees to meet a week later to plan activities, based on this information and on what they want to achieve.

The question to pose here before the action planning is:

Do we need additional information in order to plan?

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✴ **PREPARATORY WORK FOR AN ACTION PLANNING PROCESS – DEPARTMENTAL/TEAM/PROJECT**

The purpose of this questionnaire is to help you plan your future activities better, by building on what has gone wrong, or right, in the past.

Working with others in your department/team/project, answer the following questions in relation to an activity that was central to your work in the past:

1. What result were we trying to achieve?

   _____
   _____
   _____
   _____
   _____

2. What activities did we plan in order to achieve it?

   _____
   _____
   _____
   _____
   _____

3. Did we achieve the planned result?

   _____
   _____
   _____
   _____

4. If not, why not?

   _____
   _____
   _____
   _____

5. Did the activities make sense in terms of what we were trying to achieve?

   _____
   _____
   _____
   _____

6. Could we have achieved the same result at less cost, spending less time, using fewer resources, with less strain on the project or organisation?

   _____
   _____
   _____
   _____

7. What would we do differently in future?

   _____
   _____
   _____
   _____
   _____
   _____

8.   What have we learned from this analysis?

_____
_____
_____
_____
_____

It is useful to do this kind of review after every main set of activities e.g. organising a conference, publishing a book, running a series of training courses, etc. In so doing, you test your action planning constantly instead of only once a year.

Action Planning

THE AGENDA

Planning an agenda for an action planning process is very different from planning an agenda for a strategic planning process. In a strategic planning process it is important to take people through a strategic thinking exercise which helps them focus on the big picture. In an action planning process the focus is on the detail, on making sure that things happen as they are supposed to and when they are supposed to. Often organisations or projects make the mistake of trying to do their action planning at the same time as they do their strategic planning. Usually, if you do the strategic planning properly, there isn't time to focus on the detail of the action planning and it is better to do it afterwards in the relevant structure (team, department, project).

The kind of detail required in proper action planning is very different from the strategic thinking of the bigger process. The results that need to be achieved must be clearly stated during the strategic planning process, and the broad responsibility for achieving the results must be assigned to the right structure within the organisation. The actual planning should be done by the relevant team/project/department at a time agreed by those involved, and within deadlines set by management. Depending on how complex the result area is, the time needed for the planning may be shorter or longer. It is up to the structure to decide how much time will be needed and to set aside the time required. Management should set a deadline by when action plans must be submitted.

TYPICAL AGENDA FOR ACTION PLANNING PROCESS

1. Clarify the result areas on which you will be working.
2. For each result area, list the steps necessary to achieve it.
3. Sequence the steps in a logical order using a tool such as the Gantt Chart (see under When Must Steps Happen? later in this toolkit).
4. Do a summary of the outputs.
5. Assign responsibility for each of the activities involved.
6. Do a summary of the human resourcing needs.
7. Do a summary of likely costs.
8. Put it all together in a workplan schedule. (See the section on the Workplan later in this toolkit).

Action Planning

Planning Activities: Step-by-Step

Activities are the steps that you need to take in order to get the results which will contribute to the achievement of the organisation's or project's goals and objectives.

So, the starting point is what you want to achieve (the desired result), and this then gets broken down into the steps required to achieve the result. These steps need to be put in a logical sequence, and someone must take responsibility for making sure they happen. The organisation or project also needs to be sure that it has the resources or inputs it needs to carry out the steps involved.

We also include a sub-section on turning an action plan or list of activities into a business plan (from Action Plan to Business Plan) which can be used to bring other stakeholders on board.

In this section, we use a basic table to help you build up your action plan. The model is on the next page.

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✶ **BASIC MODEL FOR BUILDING UP YOUR ACTION PLAN**

Result Area:			
Activities	**Time frame (begin by, complete by)**	**Person responsible**	**Costs/inputs**

Action Planning

WHAT MUST WE ACHIEVE?

- This is the "what" – the result that the activities are supposed to achieve. Once you are clear on the what, you are ready to work out the steps to take to arrive there.

On the next page you will find the basic model with the "what" filled in with an indicator for the successful achievement of the "what", and a "means of verification" – a way of showing that the indicator has been achieved.

Action Planning

✴ **BASIC MODEL FOR BUILDING UP YOUR ACTION PLAN: "WHAT" MUST BE ACHIEVED?**

Result Area: All under-qualified teachers upgrade their qualifications.

Indicator: Teachers meet the requirements for upgrading.

Means of verification: Survey at end of the period through the schools (must be proof of upgrading).

Activities	Time frame (begin by, complete by)	Person responsible	Costs/inputs

Action Planning

WHAT STEPS DOES IT INVOLVE?

Before you can detail the steps, you need to reach agreement about a strategy for arriving at the desired result. The best way to do this is probably to brainstorm possible options, write them up on a flip chart, and then decide which make the most sense. In order to make this decision:

- Assess the advantages and disadvantages of each option;
- Compare the options against appropriate criteria such as:
    - Alignment with the organisation or general project approach;
    - Staff capacity to use a strategy;
    - Cost;
    - Timing.

In the example we have been using, the organisation decided that the best route to go was to get the teachers to upgrade their qualifications through existing tertiary insitutions. Another option might have been for the organisation itself to teach and mentor the teachers but it decided it did not have the resources to do this. Once this was agreed, the project set as an interim indicator: teachers registered to study at a tertiary insitution.

Now you have a general idea of how you are going to get the required results. You need to break the work involved down into specific steps or activities. The team needs to brainstorm the steps. For an explanation of how this could be done, go to the next page. On the page after that, we continue to fill in the basic model showing you where to fill in "what steps".

(Acknowledgement to Olive (ODT) *Planning for Implementation* for the ideas used here. See also <u>Resources</u>).

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✴ **BRAINSTORMING THE STEPS AS A TEAM**

1. Distribute cards/small pieces of paper (A5) size to each person.

2. Ask each person to write down the critical steps, the things that must happen if the result required is to be achieved through the agreed strategy.

3. Place the cards or pieces of paper on a wall.

4. Organise or cluster the cards in sequence – the order that makes sense for doing each step.

5. Check that no critical steps are missing. If any are, add cards.

6. Consolidate the steps in your basic action planning model. To see how the basic action planning model is proceeding, go to the next page.

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✶ BASIC MODEL FOR BUILDING UP YOUR ACTION PLAN: "WHAT STEPS" MUST BE COVERED?

Result Area: All under-qualified teachers upgrade their qualifications.

Indicator: Teachers meet the requirements for upgrading.
Means of verification: Survey at end of the period through the schools (must be proof of upgrading).
Progress indicator: Teachers registered to study at a tertiary institution.

Activities	Time-frame (begin by, complete by)	Person responsible	Costs/inputs
1. Contact all schools and request lists of under-qualified teachers and their subject specialities.			
2. Follow-up with schools.			
3. Contact tertiary institutions for details of relevant courses and to invite them to an Open Day at which potential students can discuss options with them.			
4. Book a venue and do logistical organisation for the Open Day.			
5. Follow-up with tertiary institutions and draw up list of possibilities.			
6. Distribute list to schools, with an invitation to the Open Day.			
7. Confirm numbers for attendance at Open Day with schools.			

8. Prepare feedback forms to be completed by the tertiary institutions and the potential students after Open Day. 9. Organise refreshments for Open Day. 10. Host Open Day – should be welcoming speech, as well as team on hand to discuss issues. 11. Collect forms at end of Open Day. 12. Do follow-up – thank institutions, analyse forms. 13. Prepare a report on Open Day. 14. Request copies of registration certificates from teachers. 15. Analyse the response. 16. Do a summary report. 17. Assign mentors to registered teachers. 18. Follow-up with non-registered teachers to find out why they have not registered. 19. Plan alternative strategies to upgrade these teachers. 20. Monitor progress of registered teachers and provide ongoing support through mentors.			

WHEN MUST STEPS HAPPEN?

Working out when each activity step needs to happen requires that you:

1. Identify a date by when the required result must have been achieved.
2. Establish a realistic starting date for carrying out the activities needed to achieve the result.
3. Calculate how much time each step needs.
4. Clarify what needs to happen before the activity can be carried out and how much time that is likely to take.
5. Clarify what needs to happen after the activity is carried out and how much time that is likely to take.

You should now be in a position to decide by when an activity must begin and by when it must be completed.

Where staff are reasonably familiar with how long certain tasks usually take, you can be fairly definite about time needed. Where they are less familiar, allow for some flexibility in case they have under-calculated.

Once you have worked out how long each activity is likely to take and scheduled each activity roughly into a period of time, you need to put all your activities together and make sure that there are no significant clashes or overlaps. A useful way to do this is to use a Gannt Chart (named after Henry Gannt who developed it). On the next page there is a detailed explanation of a Gannt Chart. Following that, you can see how the basic action planning model is proceeding.

Action Planning

✳ **USING A GANNT CHART**

(We acknowledge, with thanks, our use of Olive (ODT), *Planning for Implementation* for this description of how to use the Gannt Chart).

1. **Identify what unit of time you will use. So, for example, you could use months or weeks in a given period, or quarters. Create a table with that number of columns, and label each column**.

   In a three year project, using weeks as your unit of time would mean over 150 columns – in that case, it probably makes more sense to divide the year into quarters and work on quarters.

   However, if you are planning for one year, quarterly intervals will probably not give you the level of detail you will need. Monthly intervals would work better.

	J	F	M	A	M	J	J	A	S	O	N	D

2. **Add an additional column to the chart. Place one activity from the action plan in each row of this first column.**

	J	F	M	A	M	J	J	A	S	O	N	D
A1												
A2												
A3												

3. **Illustrate in the chart when each of the activities will be carried out**.

   You can visualise the activities in different ways:

   o An activity that will be carried out during a defined period of time can be illustrated by filling in the relevant boxes between its start and end dates with a light shade.

	J	F	M	A	M	J	J	A	S	O	N	D
A1	▒	▒	▒	▒								
A2												
A3												

   You can use light shading in this way even if you do not plan to be working "full-time" on the activity. The light shading shows that you will be working on the activity on an ongoing basis over the period of time.

   o An activity that will be carried out continuously over a certain period can be illustrated by using a solid colour to fill the boxes.

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	J	F	M	A	M	J	J	A	S	O	N	D
A1												
A2				███	███	███	███					
A3												

You can also use different colours for different result areas or goals.

- o Where activities take place at intervals you can use a colour or a light shade or a symbol to indicate when it is being worked on.

	J	F	M	A	M	J	J	A	S	O	N	D
A1						▲						▲
A2												
A3												

Here the symbol indicates report writing.

Always date your Gannt Chart so you know which is the most up-to-date version.
Everyone who is affected should get a copy of the Chart.

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✴ **BASIC MODEL FOR BUILDING UP YOUR ACTION PLAN: "WHEN" MUST THINGS BE DONE?**

Result Area: All under-qualified teachers upgrade their qualifications.
Indicator: Teachers meet the requirements for upgrading.
Means of verification: Survey at end of the period through the schools (must be proof of upgrading).
Progress indicator: Teachers registered to study at a tertiary institution.

Activities	Time frame (begin by, complete by)	Person responsible	Costs/inputs
1. Contact all schools and request lists of under-qualified teachers and their subject-specialities.	**Begin: September** **Complete: October**		
2. Follow-up with schools.	**Last week October**		
3. Contact tertiary institutions for details of relevant courses and to invite them to an Open Day at which potential students can discuss options with them.	**Begin: September** **Complete: October**		
4. Book a venue and do logistical organisation for the Open Day.	**During November**		
5. Follow-up with tertiary institutions and draw up list of possibilities.	**By the end of November**		
6. Distribute list to schools, with an invitation to the Open Day.	**Early December (before schools close)**		
7. Confirm numbers for attendance at Open Day with schools.	**January (from when schools open to end of month)**		
8. Prepare feedback forms to be completed by the tertiary institutions and the potential students after Open Day.	**By the end of January**		
9. Organise refreshments for Open Day.	**mid-February**		
10. Host Open Day – should be welcoming speech, as well as team on hand to discuss issues.	**Third week in February**		

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11. Collect forms at end of Open Day.	**At Open Day**		
12. Do follow-up – thank institutions, analyse forms.	**Last week in February**		
13. Prepare a report on Open Day.	**First week in March**		
14. Request copies of registration certificates from teachers.	**Last week in March**		
15. Analyse the response.	**From beginning of April to mid-April**		
16. Do a summary report.	**mid-April – to be completed by April 23rd**		
17. Assign mentors to registered teachers.	**By the end of April.**		
18. Follow-up with non-registered teachers to find out why they have not registered.	**By mid-May.**		
19. Plan alternative strategies to upgrade these teachers. (Will need to integrate.)	**By end of May.**		
20. Monitor progress of registered teachers and provide ongoing support through mentors.	**Ongoing throughout year.**		

WHO WILL BE RESPONSIBLE?

Unless responsibility for carrying out an activity is specifically allocated, it is very likely that nothing will happen! With responsibility must go some degree of authority. It is no use saying that someone is responsible for putting together a report by a certain date unless she or he has the authority to insist that contributors give him/her their contributions by a certain date. If the contributors fail to meet the deadline, then the collator needs to insist that their supervisors deal with the problem. You can only hold someone accountable if you give him or her both responsibility and authority to get the job done.

In deciding who should be responsible for a particular activity, you need to take the following into account:

- The experience, skills, capabilities, confidence needed to do the task.
- Who has time to do the task when it needs to be done, as well as the ability to do it.
- The willingness of someone to do a job or learn a job. Of course, there will always be some tasks no-one is too keen to do, but it does help if people either see a task as naturally falling into their work (so, for example, a bookkeeper says he will do the budgeting), or someone is interested in a particular task or tasks. Even if someone is not fully competent and experienced, if s/he is willing to be coached and mentored it may be worthwhile to invest a bit of extra time in making her/him the responsible person, as a longer-term investment in development.

If there is no-one on the team with both the ability and the time, you may need to hire in short-term contract support. If the task is fairly complex (e.g. develop a training programme) and no-one on your staff currently has the ability to do this, you may decide to hire in someone, or, as a longer-term investment, to train one or more of your staff members to do the work. This will have implications for the timing.

In your action planning process, you need to establish who is responsible for getting a task done, but this does not mean that other people won't also be involved. At the team level, you may need to spell out exactly what this means in more detail.

For a more detailed table to help you plan team involvement, go to the next page. To see how the basic action planning model is proceeding, go to the page after that.

RESPONSIBILITY TABLE

Activity	Responsibility	Authorisation responsibility	Involved in the activity	To be consulted

The shaded column is the one that goes into your basic action planning model. To see how that is proceeding, go to the next page.

Action Planning

★ **BASIC MODEL FOR BUILDING UP YOUR ACTION PLAN: "WHO" IS RESPONSIBLE?**

Result Area: All under-qualified teachers upgrade their qualifications.
Indicator: Teachers meet the requirements for upgrading.
Means of verification: Survey at end of the period through the schools (must be proof of upgrading).
Progress indicator: Teachers registered to study at a tertiary institution.

Activities	Time frame (begin by, complete by)	Person responsible	Costs/inputs
1. Contact all schools and request lists of under-qualified teachers and their subject specialities.	Begin: September Complete: October	**Miriam (Schools Project Officer)**	
2. Follow-up with schools.	Last week October	**Miriam**	
3. Contact tertiary institutions for details of relevant courses and to invite them to an Open Day at which potential students can discuss options with them.	Begin: September Complete: October	**Donna (Team Leader)**	
4. Book a venue and do logistical organisation for the Open Day.	During November	**Petrus (Team Administrator)**	
5. Follow-up with tertiary institutions and draw up list of possibilities.	By the end of November	**Donna**	
6. Distribute list to schools, with an invitation to the Open Day.	Early December (before schools close)	**Petrus**	
7. Confirm numbers for attendance at Open Day with schools.	January (from when schools open to end of month)	**Petrus**	
8. Prepare feedback forms to be completed by the tertiary institutions and the potential students after Open Day.	By the end of January	**Miriam**	
9. Organise refreshments for Open Day.	mid-February	**Petrus**	
10. Host Open Day – should be welcoming speech, as well as team on hand to discuss issues.	Third week in February	**Khuli (Director of organisation) to make speech, Donna to do organising**	

11. Collect forms at end of Open Day.	At Open Day	**Petrus**	
12. Do follow-up – thank institutions, analyse forms.	Last week in February	**Miriam and Donna**	
13. Prepare a report on Open Day.	First week in March	**Miriam**	
14. Request copies of registration certificates from teachers.	Last week in March	**Petrus**	
15. Analyse the response.	From beginning of April to mid-April	**Miriam**	
16. Do a summary report.	mid-April – to be completed by April 23rd	**Donna (with input from Miriam)**	
17. Assign mentors to registered teachers.	By the end of April.	**Donna**	
18. Follow-up with non-registered teachers to find out why they have not registered.	By mid-May.	**Donna**	
19. Plan alternative strategies to upgrade these teachers. (Will need to integrate.)	By end of May.	**Miriam and Donna (input from Khuli)**	
20. Monitor progress of registered teachers and provide ongoing support through mentors.	Ongoing throughout year.	**Mentors – supervised by Donna**	

WHAT INPUTS/RESOURCES ARE NEEDED?

The resources or inputs that are normally needed for activities are:

- Finances
- People
- Materials
- Services
- Transport

In most instances, the bottom line will be a financial cost of some kind to the organisation or project. In order to work out what the financial cost is, you have to look at all the inputs required. This is dealt with in detail in the toolkit on budgeting.

In deciding on what inputs are needed, be sure that they are adequate to get the job done. You can do this on the basis of previous experience, or, when you do not have previous experience, or your experience is out-of-date in terms of costing, you need to do a careful costing exercise.

In your action planning process, you need to note what is likely to incur costs, and then the activity needs to be carefully budgeted. The time of staff members will be one of your major costs. (In the toolkit on Budgeting, underestimating costs – categories, we talk about how you can estimate staff costs). This budget then needs to be incorporated into the overall project budget, or, if the budget already exists, compared with allocations for the relevant line items or budget areas.

Go to the next page to see how the basic action planning model is proceeding.

Action Planning

✳ **BASIC MODEL FOR BUILDING UP YOUR ACTION PLAN: WHAT INPUTS/RESOURCES ARE NEEDED?**

Result Area: All under-qualified teachers upgrade their qualifications.
Indicator: Teachers meet the requirements for upgrading.
Means of verification: Survey at end of the period through the schools (must be proof of upgrading).
Progress indicator: Teachers registered to study at a tertiary institution.

Activities	Time frame (begin by, complete by)	Person responsible	Costs/inputs
1. Contact all schools and request lists of under-qualified teachers and their subject-specialities.	Begin: September Complete: October	Miriam (Schools Project Officer)	**Phone costs, e-mail costs, Miriam's time.**
2. Follow-up with schools.	Last week October	Miriam	**Phone, e-mail, Miriam's time.**
3. Contact tertiary institutions for details of relevant courses and to invite them to an Open Day at which potential students can discuss options with them.	Begin: September Complete: October	Donna (Team Leader)	**Phone, e-mail, Donna's time.**
4. Book a venue and do logistical organisation for the Open Day.	During November	Petrus (Team Administrator)	**Venue cost, photocopying costs, phone, e-mail and Petrus's time.**
5. Follow-up with tertiary institutions and draw up list of possibilities.	By the end of November	Donna	**Donna's time and e-mail, phone costs.**
6. Distribute list to schools, with an invitation to the Open Day.	Early December (before schools close)	Petrus	**e-mail costs and Petrus's time.**
7. Confirm numbers for attendance at Open Day with schools.	January (from when schools open to end of month)	Petrus	**e-mail and telephone, Petrus' time.**
8. Prepare feedback forms to be completed by the tertiary institutions and the potential students after Open Day.	By the end of January	Miriam	**Miriam's time and photocopying costs.**
9. Organise refreshments for Open Day.	mid-February	Petrus	**Cost of refreshments, Petrus' time.**
10. Host Open Day – should be welcoming speech, as well as team on hand to discuss issues.	Third week in February	Khuli (Director of organisation) to make speech, Donna to do organising	**Khuli's time, Donna's time, time of staff at Open Day, transport costs.**

Task	Timeframe	Responsible	Cost
11. Collect forms at end of Open Day.	At Open Day	Petrus	**Already covered.**
12. Do follow-up – thank institutions, analyse forms.	Last week in February	Miriam and Donna	**Time of Miriam and Donna, e-mail costs.**
13. Prepare a report on Open Day.	First week in March	Miriam	**Miriam's time.**
14. Request copies of registration certificates from teachers.	Last week in March	Petrus	**Petrus' time, e-mail costs.**
15. Analyse the response.	From beginning of April to mid-April	Miriam	**Miriam's time.**
16. Do a summary report.	mid-April – to be completed by April 23rd	Donna (with input from Miriam)	**Donna and Miriam's time.**
17. Assign mentors to registered teachers.	By the end of April.	Donna	**Donna's time, mentor's time.**
18. Follow-up with non-registered teachers to find out why they have not registered.	By mid-May.	Donna	**Donna's time, telephone costs, transport costs.**
19. Plan alternative strategies to upgrade these teachers. (Will need to integrate.)	By end of May.	Miriam and Donna (input from Khuli)	**Donna, Khuli, Miriam – time.**
20. Monitor progress of registered teachers and provide ongoing support through mentors.	Ongoing throughout year.	Mentors – supervised by Donna	**Mentors (time accounted for above), transport costs,. Donna's time.**

On the basis of this, we would expect Donna and Miriam, and possibly Petrus, to sit down and calculate how much time each person would spend on the overall result area. This could then be costed (see the toolkit on Budgeting, the section under Estimating Costs – categories).

FROM ACTION PLAN TO BUSINESS PLAN

A business plan is really just a particular way of presenting your action plan, in the context of your strategic framework, to other stakeholders (see also ☞ Strategic Planning).

Usually, a business plan for a civil society organisation or project will have the following sections (there can be variations, but these cover the main areas):

- Cover page
- Executive summary
- Contents page
- Profile of the organisation or project presenting the plan and of the service or product being offered
- Management/governance information
- Problem analysis and solution analysis
- Action plan
- Summary of outputs and timeframe
- Summary of staffing and human resource needs
- Budget
- Appendices and supporting documentation.

What would you include under the different headings?

Cover page	This should be clear and well designed. It should state the name of the project, the name of the organisation presenting the project, with contact details, and the date on which the business plan was completed. (An example of a cover page is given after this table.)
Executive summary	The executive summary is very important. Some readers will only look at the executive summary. Try to make it no longer than one page. Include: ▪ A brief statement of the problem and solution analyses; ▪ A brief statement of why your organisation is well-placed to address the problem/provide a solution; ▪ A "summary of the summary" of outputs and time-frames; ▪ A summary of the budget. You would usually write the executive summary last to encapsulate the main points made in the document overall. It should be "stand alone" and not require the reader to refer to any other part of the document in order to get a quick overview of the project.
Contents page	Remember to put page numbers on your contents page – and check that they are correct. Sometimes, when you make corrections to a document, page numbers shift and it creates a bad impression if the page numbers on the contents page are incorrect.
Profile	Here you would: ▪ Give brief information on the background and history of the organisation and/or project; ▪ Indicate what sort of legal entity it is (e.g. voluntary association, not-for-profit company, etc.); ▪ Give the mission statement; ▪ Provide some kind of statement of main methodologies and operating principles; ▪ Provide some description of your track record.
Management /governance information	Here you explain how the organisation/project is governed and managed, where accountability is located, and who the key people are, including brief descriptions of their background to show credibility, track record, etc.

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Problem analysis/solution analysis	(See also the toolkit on Strategic Planning.) Here you would briefly explain the problem the project seeks to address, your understanding of the causes and effects, what you intend to achieve in addressing it, and your strategy (project purpose/immediate objective and key result areas as dealt with in the Strategic Planning toolkit).
Action plan	This is the detailed action plan. It could also be included as an Appendix.
Summary – outputs and timeframe	See Outputs, Timing and When Must Steps Happen? in this toolkit.
Summary– human resource needs	See Human Resourcing Plan in this toolkit.
Budget	See What Inputs/Resources are Needed? in this toolkit and the toolkit on Budgeting.
Appendices and supporting documentation	Here you could include anything that might support your case, e.g. ▪ Brochures about the organisation and/or project; ▪ Newspaper cuttings that support your case in some way; ▪ Recent audited financial statements; ▪ An organogram; ▪ Letters of support and so on.

The business plan puts your original action plan into a broader context.

✱ **EXAMPLE OF COVER PAGE FOR A BUSINESS PLAN**

BUSINESS PLAN FOR THE "EVERY STUDENT A SUCCESS STORY" (ESSS) PROJECT

presented by

Education for All (EFA)

Contact person:
The Director
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Action Planning

Implementation

Implementation means transforming a plan into action. It means taking steps to see that strategic objectives are achieved by carrying out action plans. All the planning in the world is worth nothing if there is no implementation.

There is no magic formula to ensure that implementation takes place. It requires:

- Effective **workplans** at the team/departmental level;
- **Individual plans** that are based on the team workplan and on organisational priorities;
- **Good management**.

THE WORKPLAN

In the section Planning Activities: Step-by-Step, you can work through the development of a workplan that:

- specifies the tasks to be done;
- who is going to be responsible for doing them;
- when they must be done; and
- the resources needed.

This is referred to as "the basic model for building up your action plan". Each functional work unit in the project or organisation needs to have a workplan that covers up to about one year of activities. Shorter periods may be better, at least for the detailed workplans. This workplan then becomes the guideline for daily progress within the work unit and creates a basis for co-ordinating activities across the whole project or organisation.

If a work unit is involved in more than one key result area (which is very likely), then it needs a workplan for each set of activities, as well as an integrated workplan for everything to which it is committed. (See the example in the Gannt Chart on When Must Steps Happen?) This will enable it to prioritise, reschedule, and allocate resources in such a way that the work gets done. The integrated plan from each work unit then feeds into an overall organisational or project workplan so that management can monitor what is going on, anticipate crises, prevent workjams and so on. In this way, the workplan becomes an invaluable management tool. It also provides the basis on which individuals plan their time and for what can be expected of them in terms of productivity.

INDIVIDUAL PLANS

Once each working unit, and the organisation overall, know what is expected of them, each individual staff member needs to translate this into what it means for him or her. Whether the organisation/project uses a collective/team approach to management, or a more hierarchical one, good management requires that those with responsibility for ensuring that the work gets done know what they can expect of staff, and that staff know what is expected of them. Individual workplans are done on the basis of how this can best be done.

Once each staff member has his/her own workplan, this can form the basis of a review and support process.

It is always best to get people to take responsibility for working out their own workplans. This applies to both professional and administrative staff. The starting point for this is to get each staff member to reflect on his/her work unit's plans and then to answer the following questions:

▪ What can I do in my job in this period of time to contribute to the successful implementation of my unit's action plans?
▪ How should my success or failure be evaluated? (This refers to indicators of success or failure, rather than to the actual evaluation process.)

This provides a broad framework for developing an individual workplan and then reviewing it.

Go to the next page to find an example of a progress review format for individual staff members.

Action Planning

✳   **FORMAT FOR WORK PROGRESS REVIEW FOR INDIVIDUAL STAFF MEMBERS**

Date: **Period under review:**

Name of staff member:

Name(s) of person (people) facilitating the review:

1.   Objectives/activities set for the period under review:

a

b

c

d

e

f

2.   Additional activities undertaken in the period under review:

a

b

c

d

e

3.   Objectives not achieved/activities not carried out and reasons:

Objectives/activities not achieved	Reasons
a b	
c	
d	
e	

4.   Any other problems encountered:

a

b

c

d

e

5.   Actions to be taken by staff member to prevent problems occurring again:

a

b

c

d

e

6.   Actions to be taken by organisation to prevent problems happening again:

a

b

c

d

e

7.   Objectives for the forthcoming period:

a

b

c

d

e

f

g

h

I

j

8.   Date of next review meeting:

Signed by:

Staff member:

Review facilitator:

ROLE OF MANAGEMENT

The role of management, whether it is collective management or hierarchical management, is to:

- help staff members set standards for productivity and quality;
- monitor performance – how is it going, what problems are developing, what achievements need acknowledgement, what can be done to provide support?
- meet with staff members regularly to review progress and provide support and feedback;
- deal with things that are going wrong.

We have suggested a process which moves from the work unit workplan to the individual workplan. Through this process management coaches the staff member to succeed, this is based on all parties knowing what needs to be done. The idea is to help people succeed and meet expectations, rather than to fail.

There are many different management styles. None of the following is "wrong" or "right" but some will work better in a particular situation than others:

- A directive style is one where the person or people doing the managing know what they want and expect to get it, although with some negotiation and compromise.
- A participatory style is one which is willing to negotiate almost everything if the management structure can be convinced that an alternative might well work.
- A team style is one which leaves it up to the team to negotiate the basis on which performance will be defined and assessed, and only tries to influence this through participating actively in the team.
- An assertive persuasion style is one in which management knows what it wants and sells it effectively so that staff members buy into it.

Whichever style you use in your organisation or project, management is necessary. Without some sort of oversight and review process, in relation to individual performance as well as unit performance, successful implementation becomes very difficult. Unless someone (or "someones") is responsible for dealing with it when things go wrong, the entire organisational or project action plan can be ruined.

Monitoring

Monitoring in the context of action planning is the ongoing assessment of how an organisation or project is performing against its action plans. (The toolkit on Monitoring and Evaluation looks at monitoring and evaluation of impact. This is much more complex). Monitoring in the action plan context addresses questions such as:

- Are outputs being achieved within the timeframes set?
- Are resources being efficiently and effectively used?
- Are we doing what we said we would do and if not, why not?
- Are work units meeting their objectives?
- Are individuals meeting their objectives?

Monitoring is an internal function. It goes on continuously in any well-managed organisation or project. It helps those in leadership positions determine whether the organisation or project is implementing its action plan effectively and efficiently. It helps them account to other stakeholders for what is happening in the project or organisation. It helps them learn from mistakes and it helps management or leadership take corrective action when necessary.

Don't just collect information for the sake of having it. You must have a purpose, a reason for collecting the information.

At the planning stage, the questions to ask are:

- What sort of information do we need?
- How will we use the information?
- How can it be collected with the least possible trouble?
- Who will collect it?
- Who will analyse it?

In the section on collecting information as you go along, we look in more detail at methods of collecting information and what to do with it.

COLLECTING INFORMATION AS YOU GO ALONG

There is no point in just collecting information randomly. You need to focus your information collection process around the questions you want answered about your action plan, and with a more long-term perspective, the questions you will want answered about your strategic plan.

When you do your planning, you need to identify the indicators (see Glossary of Terms) around which information should be collected. Usually, when you are looking for evidence that will show progress in activities and will be useful later in reflecting on efficiency, effectiveness and impact (for more on this see the toolkit on Monitoring and Evaluation), you ask questions about:

- How many?
- How well?
- How often?
- Who benefited?
- How did they benefit?

In reporting on activities, you need information that tells you how well you have done in terms of your targets or what you planned to achieve. This means looking at outputs and deadlines regularly so that you can take corrective action. You also need to look at key result areas, and at the progress indicators you developed for those.

Where does the information come from?

- From documentation such as letters, reports, plans, contracts, attendance lists, forms, invoices, receipts, minutes, reports.
- From questionnaires, focus groups, anecdotal input which should be recorded (stories people tell).

Baseline information is important. Baseline information is what you know about a situation when you begin. So, if you are planning to improve the qualifications of teachers in a particular area, then you need baseline information about what their qualifications were when you started. Part of your action plan must be collecting this information and then keeping it in an accessible way so you can compare the situation at the beginning with what it is while your action plan is being implemented and after your action plan has been implemented.

Information must be **collected** and it must be **analysed**. So, for example, you may know how many people are attending the community meetings you have organised because you have attendance lists (collecting information). But what does it mean that more men than women have attended, or that some meetings are attended by far more people than others (analysing information)?

When you analyse the information, you are looking for the unexpected, and trying to learn from any deviations (differences from the expected) so you can improve your practice. One way of analysing is as follows:

Expected indicator	Actual situation	Any deviation?	Probable reason for deviation	Lessons and recommendations
At least 85% of under-qualified teachers register for degree courses.	45% registered.	Far fewer than expected registered.	Lack of financing to cover tuition costs.	Teachers at this level earn very little. There needs to be some sort of financial support for a process of this kind. Need to approach the Education Department for help in organising some sort of bursary and/or loan scheme.

(With thanks to Olive Publications, *Planning for Implementation*).

Here, the confirmation of registration certificates and the original information from schools about the numbers of under-qualified teachers were the documentation that was collected (in this case, by the administrator). The professional staff from the project took the documentation and analysed it. When they realised that there was a major deviation from what they had expected, they went and spoke to the teachers who had not registered and identified the reason. They were then able to take corrective action.

It is not necessary to add complicated record-keeping to your work in order to monitor. In most cases you can use the simple systems you already have. Make sure that things such as:

▪ Attendance registers;
▪ Field officer reports;
▪ Time sheets;
▪ Financial record systems;
▪ Minutes of meetings

and so on are designed so that, when analysed, they will give you the information you need. For example, if gender issues are important to you, then you may want to include columns for first and second names on your attendance register so that you can work out how many women and how many men attended the meeting or workshop, or just have a "gender column" (Male/female).

Your methods should be appropriate to the information you need, but as simple as possible, so:

▪ If you have set participation of community members in development meetings as an indicator of increased empowerment of the community, then your information collection tool might be minutes of development meetings that include details of who said what.

▪ If more spare time available to women is set as an indicator of an improvement of quality of life of women in certain villages, then your field officer reports should give details of what is happening in the villages that is different from when the baseline study was done.

- If financial stability is seen as an indicator of sustainability, then regular bookkeeping records should be anlaysed to reflect this.

The important thing to remember is to build information collection and analysis into your action plans.

Action Planning

BEST PRACTICE

Examples

Completed example of a basic action planning model used in this toolkit:

✶ **BASIC MODEL FOR BUILDING UP YOUR ACTION PLAN: WHAT INPUTS/RESOURCES ARE NEEDED?**

Result Area: All under-qualified teachers upgrade their qualifications.
Indicator: Teachers meet the requirements for upgrading.
Means of verification: Survey at end of the period through the schools (must be proof of upgrading).
Progress indicator: Teachers registered to study at a tertiary institution.

Activities	Time frame (begin by, complete by)	Person responsible	Costs/inputs
1. Contact all schools and request lists of under-qualified teachers and their subject-specialities.	Begin: September Complete: October	Miriam (Schools Project Officer)	Phone costs, e-mail costs., Miriam's time.
2. Follow-up with schools.	Last week October	Miriam	Phone, e-mail, Miriam's time.
3. Contact tertiary institutions for details of relevant courses and to invite them to an Open Day at which potential students can discuss options with them.	Begin: September Complete: October	Donna (Team Leader)	Phone, e-mail, Donna's time.
4. Book a venue and do logistical organisation for the Open Day.	During November	Petrus (Team Administrator)	Venue cost, photocopying costs, phone, e-mail and Petrus's time.
5. Follow-up with tertiary institutions and draw up list of possibilities.	By the end of November	Donna	Donna's time and e-mail, phone costs.
6. Distribute list to schools, with an invitation to the Open Day.	Early December (before schools close)	Petrus	e-mail costs and Petrus' time.
7. Confirm numbers for attendance at Open Day with schools.	January (from when schools open to end of month)	Petrus	e-mail and telephone, Petrus' time.

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8. Prepare feedback forms to be completed by the tertiary institutions and the potential students after Open Day.	By the end of January	Miriam	Miriam's time and photocopying costs.
9. Organise refreshments for Open Day.	mid-February	Petrus	Cost of refreshments, Petrus' time.
10. Host Open Day – should be welcoming speech, as well as team on hand to discuss issues.	Third week in February	Khuli (Director of organisation) to make speech, Donna to do organising	Khuli's time, Donna's time, time of staff at Open Day, transport costs.
11. Collect forms at end of Open Day.	At Open Day	Petrus	Already covered.
12. Do follow-up – thank institutions, analyse forms.	Last week in February	Miriam and Donna	Time of Miriam and Donna, e-mail costs.
13. Prepare a report on Open Day.	First week in March	Miriam	Miriam's time.
14. Request copies of registration certificates from teachers.	Last week in March	Petrus	Petrus' time, e-mail costs.
15. Analyse the response.	From beginning of April to mid-April	Miriam	Miriam's time.
16. Do a summary report.	mid-April – to be completed by April 23rd		
17. Assign mentors to registered teachers.	By the end of April.		
18. Follow-up with non-registered teachers to find out why they have not registered.	By mid-May.	Donna (with input from Miriam)	Donna and Miriam's time.
19. Plan alternative strategies to upgrade these teachers. (Will need to integrate.)	By end of May.	Donna	Donna's time, mentor's time.
20. Monitor progress of registered teachers and provide ongoing support through mentors.	Ongoing throughout year.	Donna	Donna's time, telephone costs, transport costs.
		Miriam and Donna (input from Khuli) Mentors – supervised by Donna	Donna, Khuli, Miriam – time. Mentors (time accounted for above), transport costs. Donna's time.

RESOURCES

Civicus would like to acknowledge the following as invaluable resources in the preparation of this toolkit:

Olive Publications   *Project Planning for Development*, Olive 1998

Olive Publications   *Planning for Implementation*, Olive 2001

Olive Publications   *Planning for Monitoring and Evaluation*, Olive 2002

Shapiro, Janet   *Evaluation: Judgement Day or Management Tool?*   Olive 1996

GLOSSARY OF TERMS

Indicator	An indicator is a measurable or tangible (concrete) sign that something has been done. So, for example, an increase in the number of students passing is an indicator of an improved culture of learning and teaching. The means of verification (proof) is the officially published list of passes.
Matrix team	A matrix team is one that cuts across functions to include a range of functions necessary to do a job well.
Rigorously	Rigorously is a word that describes a systematic, honest, disciplined, thorough way of working. When you are rigorous, you do not look for easy solutions or easy ways out. You look for real understanding and accurate information.

Action Planning