

9. Planning – Implementation – Evaluation

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Terms and Definitions – Types of Plans

(Source: Flo Frank's Toolbox)

- **Strategic Plan** – a long-term (Big Picture) plan. It sets the organizational direction for the next 3 – 5 years (sometimes longer) and is normally developed by the Board of Directors.
- **Operational Plan** – a one and two year overview of priorities (with a three year window) developed to guide the work of the staff and to give the “whole picture” at a glance. It provides detail to the objectives of the strategic plan and outlines the key actions required to implement the strategic goals. This plan is normally developed by the Executive Director (with input from staff) and is reviewed (or approved) by the Board of Directors.
- **Annual Plans** – these plans (if required) provide very specific detail for one year of operation with staff, budgets, desired outcomes and measures and detailed actions that are linked to both the operational plan and individual work plans.
- **Work Plans** – these are annual plans developed by each staff member. They outline the priorities and work specifics to be accomplished by various individuals (based on job descriptions and the operational or annual plan).
- **Strategies** – are plans within the plans. They are often used for activities or initiatives that are complex enough to require a guide for their development (e.g. communication, human resources, financial sustainability, marketing, etc.).
- **Business Plan** – a plan developed for external promotion (usually to attract funding and investments) and internal management of an organization from a business perspective. It identifies items such as: products, market, feasibility, competition and financial projections
- **Performance Review/Assessment** – an annual evaluation of work and accomplishments of staff based on their work plan goals. A two-way exchange to review successes, shortcomings and areas to improve as well as to identify any needs or limitations to being effective in the job.

Strategic Planning – Format and Explanations

(Source: Flo Frank's Toolbox)

What is a Strategic Plan?

- A strategic plan is a formal document/framework that describes the vision and purpose of an organization/committee and the goals and strategies it will use to achieve its vision and purpose.
- The strategic plan is a long-range plan. It sets the direction for the organization over a three to five year time frame.
- A strategic plan should inspire and motivate. It provides a framework priority setting and for decision-making.
- There are many different strategic planning processes and the language used in these planning processes can vary.
- The key is that an organization/committee has an agreed to process and a common understanding of language/terms.

Format and Explanations

Vision (Where we want to go?)

- Creates a common picture for the future. Describes the ideal state.
- If all that you hope to achieve as an organization is put into place what does it look like?

Purpose/Mission

- The unique reason why our organization/committee exists.
- What is the primary reason for the creation and on-going operation of our organization?

Environmental Scan

- Describes where we are now as an organization/committee. Identifies the strengths, weaknesses, opportunities and threats facing the organization. The strategic plan should build on strengths and opportunities and respond to weaknesses and threats.

Success Factors

- The outcomes we wish to achieve. The impact, benefit or change that results from our activities.
- What results or outcomes do we expect to see from our actions.

Goals

- Broad statements of intent that outline how we will fulfill our purpose and reach our vision.
- What are the areas for action that we will undertake to close the gap between where we are now and our vision?

Strategies for Actions – Action Plans

- Identification of the big picture action that we will take to achieve our goals.
- What type of action is needed to achieve our goals and reach our success factors?
- How will we know we are reaching them?

Operational Plan Template

(Source: Flo Frank's Toolbox)

The following is a template to link between the strategic plan goals and the actions needed to implement it – each big picture goal from the Strategic plan needs an overview like the one below in order to be operational.

Goal: (from the strategic plan)

Desired Outcomes: (what do we want to see for results from this goal)

Actions	Who – When	Resources	Comments

Form Ideas to Action: Action Plan Format

(Source: Flo Frank's Toolbox)

Idea: _____

Description of Action – what we want to do? _____

Rationale – why we want to do it? _____

Desired Outcomes – what we hope will happen? _____

Issues or Obstacles to Overcome: _____

Actions – Next Steps

1.

2.

3.

Example - Action Plan

(Source: Flo Frank's Toolbox)

Description of Action: Open A Youth Centre

Rationale:

- Keeping youth busy to create a positive environment
- A place to hang out
- A place for youth programs (games)

Desired Outcomes:

- Lower crime rate
- Wellness
- More youth programs
- For youth by youth

Issues or Obstacles to Outcomes:

- No facility
- No funding
- Communication
- No leader

Action:

- Step 1: Organize and Form Steering Committee
- Step 2: Pick a Leader/Delegate Roles
- Step 3: Gain Support (letters of support, petition)
- Step 4: Approach the Hamlet for a Place and Support
- Step 5: Apply for Funding (contact, regional wellness coordinator)
- Step 6: Start and Maintain the Youth Centre
- Step 7: Evaluate Results

Evaluation Tool

(Source: Flo Frank's Toolbox)

The purpose of evaluation is to look at progress being made – milestones being reached, or the results of something that has taken place. Evaluation can be formal (normally done by an outside specialist) or informal (done by program staff and perhaps participants or other community stakeholders).

Core Information:

1. What is being evaluated?
2. Why are we evaluating this?
3. What were we aiming for in the program or activity – what did we hope would happen?
4. What actually did happen? Who attended, how many, what took place?
5. What did they have to say? Use evaluation forms or other types of feedback.

Analysis:

When we have the above information we need to ask three basic questions:

- Do we have enough and the right type of information? (If not get more).
- Is the information we received valid? (If not find ways to improve it).
- What does the information we received mean?

Report:

Normally an evaluation results in a report of some type. The report provides an overview of the goal of the evaluation, the process used and the findings. As well it would include the analysis (what the data means) and recommendations (suggestions about what to do as a result of the evaluation).

Action:

An evaluation often results in changes and improvements. To determine what to do next, answer the following questions:

1. How will we use the results we have obtained?
2. What changes should be made to anything we are doing?
3. Who else do we need to share the evaluation with and why would we share it with them?
4. How can we leverage what we have learned to improve or enhance what we do?
5. Are there other uses for this information?
6. Who will do what in order to move things forward?
7. When will we do another evaluation and what will we evaluate at that time?