

Your Approach to Planning

Planning is most successful when the approach you choose is tailored to the unique needs and characteristics of the agency. The choices you make should take into account current realities, working styles, dynamics, environments, vision, beliefs and needs.

Successful planning processes:

- Are supported by all management and staff
- Build on a shared vision
- Are inclusive and participatory processes in which management and staff take on joint ownership
- Require flexibility and adaptability
- Are based on quality data
- Lead to action and are a key part of effective management – the plan does not sit on a shelf and implementation is not left up to chance

Successful planning is hindered by:

- Lack of, or limited, understanding, familiarity and comfort with planning
- Limited financial, personnel and time resources to carry out the process
- Resistance to planning on the part of management members, staff and other individuals due to fear of change in the organization's structure, operations, or interpersonal dynamics
- Inability to see beyond current problems and the immediate future
- Lack of commitment to implement
- Unpredictability of the external environment

Taking all of this into account, your approach may be as simple as selecting one or two goals and then working to accomplish those goals. Or, it you may need a more a comprehensive planning method such as strategic planning.

The purpose of planning is to help you determine specific goals and then to achieve them. However to be successful, the planning methods you choose need to be practical, manageable and realistic for your agency in its day to day operations.

The purpose of this tool is to provide you with a better understanding of planning and the options that are available. It also provides additional information on how planning can integrate with your budget, how it relates to your agency's values, vision and value

proposition and the importance of the human element involved in change management. In addition it includes suggestions for developing better plans in working with your carriers.

Putting all of this together will help you make decisions about your approach to planning.

Additional information on this and other planning topics can be located through the RESOURCES section on the main menu.

