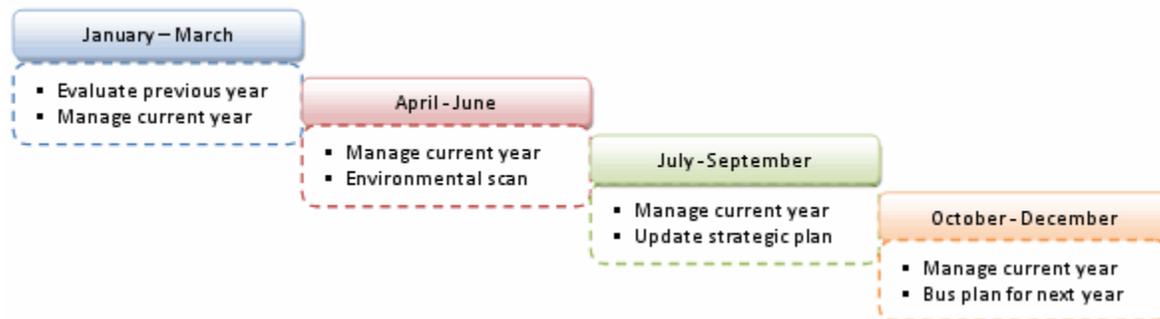


## Complex Planning Model

A planning process should incorporate a review of the previous year, monitoring of the current year and a look ahead to the next year (and beyond). A simplified process might look something like:



This process is meant to be fluid and revolving. In January, the approved business plan is initiated, while the previous year is evaluated. Of course the previous year was monitored throughout, but now can be formally evaluated. Were the planned activities carried out and what was the result on the goals and objectives? In the 2nd quarter, while continuing to manage and monitor the current business plan, efforts would be made to scan the environment. This could be done through meetings with stakeholders, a review of data, discussion with public officials, etc.

In the 3rd quarter, beyond managing and monitoring the current business plan, a formal review of the strategic plan, including mission, vision and values, would be undertaken. One strategy being used more and more, is to 'bump' the plan forward each year by another year. For example, a strategic plan that covered 2007 - 2010, could be reviewed, adjusted and augmented to now be the strategic plan 2008 - 2011. This way, the plan is regularly being reviewed and the organization is always looking forward three years. It alleviates the challenges of new initiatives being started every few years to develop strategic plans. The fourth quarter would see the finish of the current business plan and approval of the business plan for the next year.

To assist in the development of strategic directions and building upon the mission, vision and values, it can be helpful to determine focus areas, those main areas of concern or interest for the organization. These can also be called core business areas, or a host of other terms. From there, strategic goals can be developed, within these focus areas, which are typically long term substantive ends statements of what is going to be achieved.

To be successful, strategic planning should be entrenched as part of the group, not as a special initiative. The strategic plan then serves as the foundation for the business plan, which includes annual objectives. These objectives need not be lofty, but rather describe the operations that contribute to the strategic goals.

In fact, everything that occurs within the organization needs to be listed within one of the annual objectives. If there is an activity that is occurring not within an annual objective, either the objectives should change or the activity should cease. Again, planning should be seen as part of

what the organization is and the objectives should be linked with the broader strategic goals and can be further categorized into mission objectives and enabling objectives (those support functions which allow the mission objectives to be achieved), or external and internal objectives.



Of course, all objectives need to be monitored and measured. Measurements can be quantity and/or quality - both are valid and valuable in evaluating. Quantifiable measurements are definite and empirical while qualitative are based on input and opinions.

Lastly, all resources of the organization - funds, human resources, facility, etc. can be allocated to the objectives. For the broader costs (eg. insurance), a costing model can be employed, where determinations are made on costing out the expenses. This allows one to see the true cost of an activity, not just the direct costs. By including budgeting within the planning process, conscious decisions are made on the weighting of the different activities which contribute to achieving the goals.