



THE ORGANIZATIONAL PLAN

Planning is the right process

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SANTO TOMAS

ORGANIZATIONAL PLAN



1. What's Organizational Plan?

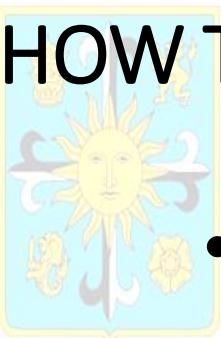
- **An organizational plan** is basically a “to do” list for an organization. It lists out the plan of work, programs, and organizational growth over a period of time - six months, a year, a five years.
- Planning helps an organization chart a course for the achievement of its goals.

ORGANIZATIONAL PLAN



A plan can help you:

- Set priorities for your work
- Make sure tasks get done on time
- Focus on one thing at a time
- Share work among staff, board members and volunteers
- Make your goals clear to funders
- Get a handle on big projects by breaking them down into smaller tasks
- See the big picture of what your organization is doing



HOW TO PLAN?

- DECIDE ON CATEGORIES
- SET GOALS
- SET TASKS
- PLAN A SCHEDULE
- CHOOSE RESPONSIBILITY
- SUPPORT
- FOLLOW THROUGH
- EVALUATION

DECIDES ON CATEGORIES

- First, think about all the work that your organization does, and list out the general categories
- for example:
 - Fundraising,
 - Community Outreach,
 - Website,
 - and so on. . .



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SET GOALS



- Second, make sure the goals for your work in each category are clear.
- Ask yourselves, “Where do we want to be with this work in a year or two or more?”

Example: Fundraising: Raise \$8000.



SET TASKS

- Next, discuss each goal and talk about all the tasks that need to be done to achieve that goal.
- At this point, they don't have to be in order. Some will be more specific than others; the more specific the better, in general.
- You may not know how to reach some goals, yet; it's fine to have a task list that looks like

“Get fundraising training. Create fundraising plan and schedule. Carry out plan.”

PLAN A SCHEDULE



- Make sure that all the tasks are listed, number them.
- Then draft a schedule for the tasks—either when they will be completed, or (for ongoing tasks) when they will begin.
- The goal is to set a schedule that is challenging but realistic.

CHOOSING RESPONSIBILITIES

- Assign responsibilities by asking people to volunteer to be responsible for goals or tasks.
- If nobody is willing to volunteer for a particular task, ask the group if it is really necessary to do it. If the group decides that it is, try to break it down into smaller tasks that might be easier to take on.

SUPPORT

- Brainstorm other individuals and organizations that can provide support, assistance or advice in helping you carry out particular tasks or achieve general goals.
- Get support from other stakeholders like government departments etc.

FOLLOW THROUGH

- Come up with a plan to check in
- Support and encourage people as they carry out their tasks.
- This may mean choosing one person to regularly check on the status of different tasks, or it may be part of reporting back at meetings.



PLAN EVALUATION

- Finally, set a time to revisit the whole plan as a group to evaluate how things are going and revise assignments and schedules.
- This may be a few months or half a year in the future.

VARIOUS TYPES OF PLANS

Business Planning

- Help to prepare for the growth & assimilate additional resources into the company.

Performance Planning

- As your business grows, your performance metrics will need to change to reflect your increasing activity.

HR Planning

- Keep the HR department updated on personnel projections, human resources group needs to continually acquire resumes.

Financial Planning

- Keeping your financing options available for your company can be an important part of the growth of your company

TYPES OF ORGANIZATION PLANS



Operational Plans

Tactical Plans

Strategic Plans

Start-up Plans

Corporate Plans

Growth Plans

HR Plans



Importance of Planning - Why Planning is Important?

1. Increases Efficiency
2. Reduces Business-related Risks
3. Facilitates Proper Coordination
4. Aids in Organising
5. Gives Right Direction
6. Keeps Good Control
7. Helps to Achieve Objectives
8. Motivates the Personnel
9. Encourages Creativity and Innovation
10. Helps in Decision Making



DEVELOPING THE MANAGEMENT TEAM

- The management team is prepared to operate the business full time and at modest salary.
- Management team must be well committed
- Very high salary may not afford by the entrepreneur

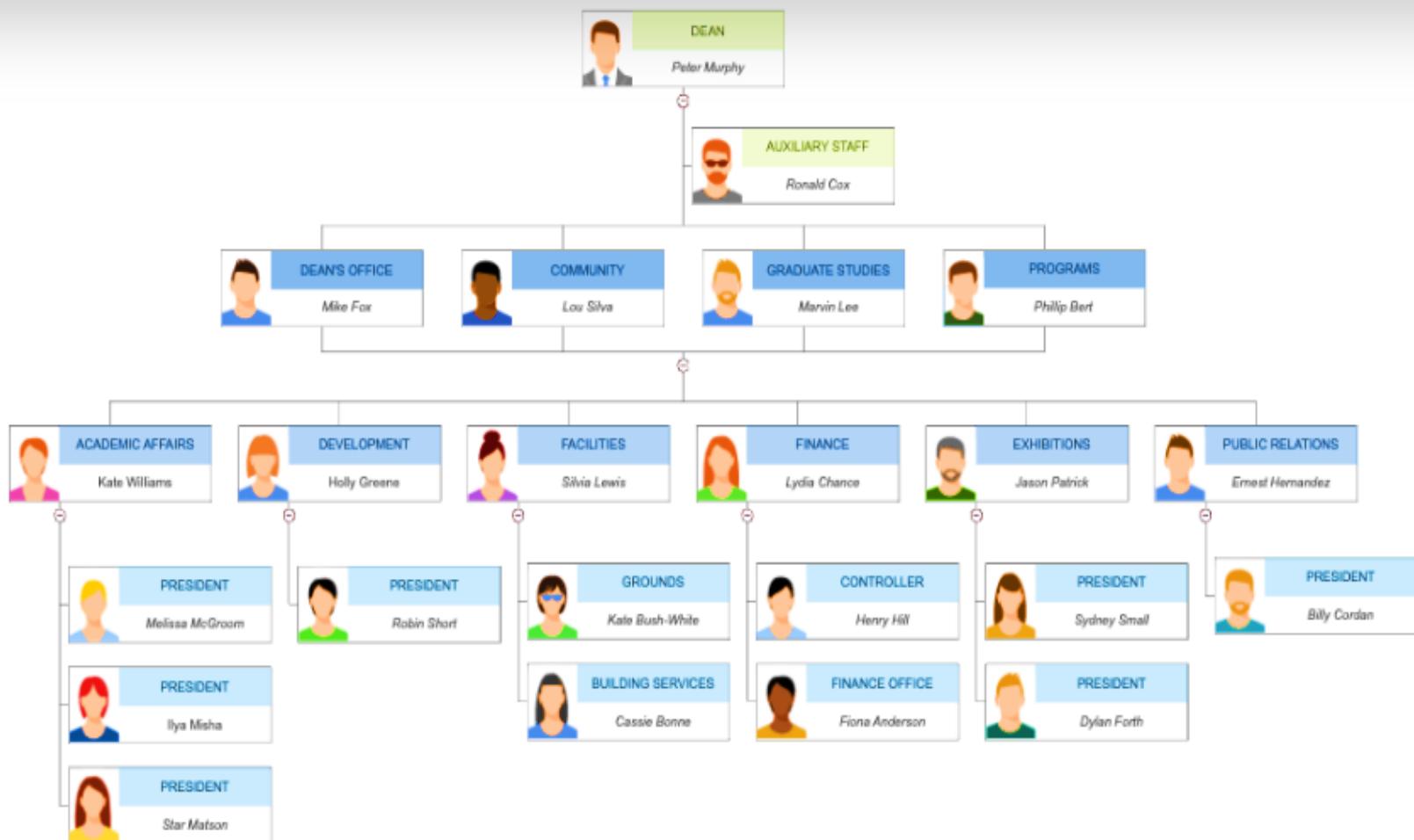
DESIGNING THE ORGANIZATION

- Generally the design of the initial organization must be simple
- Design of the Organization will be entrepreneurs formal and explicit indication to the members of the organization as to what is expected of them.
- Typically these expectations can be grouped into the following five areas

DESIGNING THE ORGANIZATION

1. Organization Structure defines members' jobs and the communication and relationship these jobs have with each other. These relationships are depicted in an organization chart.

ORGANIZATIONAL CHART



DESIGNING THE ORGANIZATION

- **Planning Measurement and Evaluation Schemes** means all organization activities should reflect the goals and objectives that underlie the venture's existence. The entrepreneur must spell out how these goals will be achieved (plans), how they will be measured and than evaluated.



DESIGNING THE ORGANIZATION

3. **Rewards:** Members of an organization will require rewards in the form of promotions, bonuses, praise, and so on. The entrepreneur or other key managers will need to be responsible for these rewards
4. **Selection Criteria:** The entrepreneur will need to determine a set of guidelines for selecting individuals for each position

DESIGNING THE ORGANIZATION

5. Training on or off the job must be specified. This training may be in the form of formal education or learning skills

Stages in Organizational Design



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Stages in Organizational Design

Develop Charter

- Establish Project Charter
- Conduct snapshot assessment
- Educate leaders
- Commission design team
- Begin change management strategies

Stages in Organizational Design



Create Strategy

- Scan external environment
- Assess current mission, vision, values, strategy, goals
- Establish core ideology
- Set future vision, strategy
- Create balanced scorecard

Stages in Organizational Design

Assess

- Analyze processes, structure, systems, and culture
- Report out to steering team
- Continue change management strategies

Stages in Organizational Design

Design

- Establish design guidelines
- Define business model
- Redesign processes, structure, systems and culture
- Verify the design
- Report out to steering team

Stages in Organizational Design

Transition:

- Commission implementation team
- Flesh out design recommendations
- Create detailed implementation plans
- Train people in new roles/skills
- Reconfigure equipment, work-space

Stages in Organizational Design

Implement

- Go live
- Monitor progress
- Implement new organizational structure
- Continue change management strategies

Stages in Organizational Design

Evaluate & Renew

- Assess performance against balanced scorecard
- Make adjustments to design
- Continue training leaders and employees