



worldoutreach  
SCHOOL OF LEADERSHIP

## SERIES FOUR

### MODULE FOUR: PLANNING

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## ***Outline Session 1 - 2***

1. Planning (Part 1)
2. Planning (Part 2)

## SESSION ONE: PLANNING (PART ONE)

Planning is organising the sequential tasks and steps necessary to carry out a role or project.

Planning is strongly linked to vision, strategic planning, delegation & goal setting as follows:

- Vision sets the overall direction of the church, group or organisation
- Strategic planning determines how the church will move forward in specific actions
- Delegation determines who will fulfil specific tasks and roles in the strategic plan
- Goals become the measurable outcome of each strategy or plan

Once the leadership have agreed on an action or on a solution to a particular problem, the next step is to convert that into a step-by-step series of actions by *planning*.

### Definition of planning

Planning is organising the sequential steps to achieve an objective (goal or project).

It is intentional and involves arranging and scheduling people and tasks to accomplish the role or project. In simple terms, planning is determining 'who' is to do 'what' by 'when' to accomplish each action toward an agreed objective. Or, in different terms, planning is deciding where to go, how to get there and how to know when you have arrived.

### STEPS TO FOLLOW IN HOW TO PLAN AND MANAGE A PROJECT

#### 1. Establish the objective (outcome)

Define clearly, in concrete terms, the purpose of the task, role or project. Ask the following questions in the process:

- What is it we plan to achieve?
- What is the criteria for a successful outcome?
- What is the end result we're looking for?

Benefits of establishing the outcome:

- The planning team will collectively know where they are headed
- The outcomes will have been decided consultatively rather than unilaterally imposed
- The objective is understood
- The outcome is a reference point in every step of the planning process

#### 2. Set a deadline

Now that the objective has been established (step one), set a deadline. Some tasks, roles or projects must be completed by a certain completion date. Our planning will hinge on this final deadline.

Some helpful questions to determine the deadline might be:

- When do we want this task, role or project finished?
- What is a reasonable but realistic timeframe for completion?
- From our past experience, how much time does it normally take us to get something like this done?

Setting a deadline will help the planning team to work backwards. A deadline also helps to schedule (set a time frame) for each subsequent action step. In other words, as the plan unfolds, every sequential step must have its own timeframe (deadline) working toward the definite completion date.

### **3. Identify the steps to be done**

Once the objective has been established (step one) and the deadline is set (step two), list every action (no matter how big or small) that need to be done to complete the task, role or project.

This step not only involves the 'big' tasks, but also the smaller 'sub-tasks' which make up the big tasks. Record everything no matter how seemingly inconsequential. It could be a long list, but it must be a complete list. Initially it doesn't have to be in order, but ensure nothing is missing.

To help identify every step to be done, here are some questions to consider:

- How, in practical steps, are we going to accomplish the objective?
- What needs to be done to fulfil our objective?
- If we don't know what steps to take in some areas, who can we call upon to give us some external advice to help us identify the steps?

### **4. Organise the tasks in sequence**

The next step is to arrange the tasks (listed in the previous point) into the sequence in which they'll be tackled.

From the list of tasks (step three), ask the following questions to work out the sequence:

- What happens first?
- What comes next?
- Then what?
- What is the final step?

Timing becomes a vital factor in accomplishing a task, role or project. Projects need a sequential line of development – one job needs to be done before moving on to the next one. Or it may be a parallel line of development – several jobs can be taking place at once, or both.

Record the sequence of tasks on a spreadsheet or chart.

### **5. Allocate a time frame for each task**

Estimate how much time each task will take. In practical terms, this means allocating dates by which you intend to complete each of the sequential actions. The purpose of this step is to set a target date for each task. Once each date has been allocated, record the time frame next to the specific task or action on the spreadsheet or chart.

## **6. Create a schedule**

Using this information, you now have a target date for each task on your spreadsheet or chart. It is sometimes wise to also set specific review dates to evaluate progress and to modify your course of action if necessary.

If you have a definite completion date, it is often helpful to work backwards from that date. This will provide you with an indication of how much time needs to be applied to get the project finished in time.

## SESSION TWO: PLANNING (PART TWO)

Last time, we defined planning as: 'organising the sequential tasks and steps necessary to carry out a role or project.'

So far, we've looked at the first six of twelve steps in effective planning:

1. Establish the objective (outcome)
2. Set a deadline
3. Identify the steps to be done
4. Organise the tasks in sequence
5. Allocate a time frame for each task
6. Create a schedule

Now, let's work through the final six.

### 7. Assign tasks

Delegate appropriate tasks to project members. It is important to allocate people with the strengths and skills that match the task. Ensure all team members are available at appropriate times and are fully briefed as to their responsibilities and deadline dates. List the person's name on the spreadsheet. In essence, this is determining and detailing 'who' is doing 'what' by 'when'.

### 8. Establish a budget

Projects generally cost money. For a project to be successful, adequate funding needs to be budgeted before the sequential steps begin. Therefore, part of the planning process is to formulate a budget.

Here are some practical ideas:

- Assign someone with aptitude in finance to help formulate the budget
- This same person (or another delegate) needs to be appointed to take responsibility to oversee the budget throughout the life of the project
- Estimate all costs associated with each task (e.g. expenses, resources, wages, capital purchases, etc.)
- Draft up a spreadsheet linked to the tasks
- If necessary, seek approval from the church Board for the funds or seek permission to begin raising the budget
- Implement good checks and balances for expenditure and reporting (financial accountability)
- After completion of the project, review the final expenditure against the budget to see how things may be improved for future projects

### 9. Allocate resources

Allocate financial, physical and human resources to each action step. The best way to do this is by asking what resources the person needs to carry out the specific action step by the scheduled date? It would be wise to seek the views of the person involved.

## 10. Collate all spreadsheets which detail who does what by when and the corresponding budget

Before implementing the step-by-step plan, *collate* all the spreadsheets, lists and budgets. Translate all the information to one spreadsheet with vertical and horizontal columns detailing:

- Actions
- Specific details of the action
- Who will carry out that specific action
- When it needs to be completed
- Budgetary cost

The plan is now finalised in specific terms. The information can now be made available to all involved. Go over the whole plan with all those involved (including who does what and timelines) *before* implementing the first actions of the plan.

This will help the planning team to see the overall process and picture. It will also help each person to understand the sequence of actions toward the agreed outcome and completion date. This one sheet also serves to assist each person comprehend how crucial their role is in achieving the overall plan.

Another vital benefit is that this overall 'plan' is what you, the team leader, will supervise.

## 11. Identify possible problems

Consider all of the things that could potentially go wrong in the process of implementing an action. List each one of these problems, identify their causes and think of suitable actions to resolve them. If necessary, it would be wise to allow a little time in the timeline for reviews, adjustments and solving problems (see point 6).

## 12. Implement and monitor the project to completion

A final step is to supervise the project from implementation to completion.

As soon as the plan is implemented, *monitor* the progress of the project as follows:

- *Keep track of progress.* Refer frequently to the master plan (detailed spreadsheet) to see if everyone and everything is on track.
- *Communicate regularly.* Conduct formal and informal meetings with the team members. Use whatever communication tools are at your disposal to stay on top of what's happening. Communication should be two way: the planning team need to hear from you, and you need to hear from them.
- *Become a trouble shooter.* Identify trouble spots and emerging gaps between scheduling and actual performance.
- *Take corrective action.* When necessary, step in to develop alternative solutions, take remedial action, and follow-up to ensure your solution is effective.
- *Use your leadership skills.* Keep people motivated and focused, resolve conflicts, facilitate meetings, help to develop people and lead the team.
- *Evaluate the project.* On completion, hold debriefings to review problems and successes, review how people went in their roles, and make future

recommendations for future projects. This is also wise on a personal level: what did *you* learn in the process about (a) yourself, (b) your leadership, (c) managing a team, (d) the planning process, and (e) implementing a plan.

- *Be generous in encouragement.* Acknowledge and affirm people who have done a great job. Encouragement from, and the recognition of, a team leader is a strong motivating force.

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*REFERENCES IN THIS MODULE:*

**JUST ABOUT EVERYTHING A MANAGER NEEDS TO KNOW** by Neil Flanagan & Jarvis Finger,  
Plum Press: Brisbane, Australia, 1998.