

How To Compile Your Annual Route Plan (507)

Your route should plan ahead because this will help achieve better results and offers your route members a shared document reflecting what the members set out to achieve jointly for the coming year.

This Guide should be read along with the other factsheets on planning listed at the bottom of this page, since these offer many insights into planning in this Guide in the context of doing your annual plan.

Why it is important to compile an annual route plan

One of the very important results of your route's planning process will be to document the annual route plan so that you have a point of reference for use in the following:

- Assigning responsibilities to individuals – with a documented annual plan, Route Forum members can be kept accountable for the deliverables they took responsibility for.
- Confirming deadlines for achieving important milestones at different points in the year, which makes it possible to gauge progress and revise plans if needed.
- Providing individual members and specifically Route Forum members with the authority to act on behalf of the route.
- Defining a budget as approved by the members, where the anticipated income and allocated expenditure items for the route are specified.

What is involved in writing an annual plan?

Your annual plan is a documented record of the planning for the coming year ahead. It is the outcome of your route planning process, which could include a members' workshop or other forms of membership consultation.

In fact, it would most likely be counterproductive for the route's leaders to produce an annual plan without involving the members. "The plan must be the members." They must be motivated to contribute their time to the route.

In producing the annual plan, you should understand that planning forms part of the plan-do-review cycle and that planning is mostly preceded by reviewing what happened thus far, and is then followed by the doing.

Having noted that members' inputs should be sought and – if possible – a route workshop should be organised, it must also be acknowledged that some individuals may be better than others at writing the document and compiling the needed information. For this purpose, it may work well to appoint a task team to compile a draft version of the planning documents, so that members and/or the Route Forum may inspect the implications of adopting the plans (as what must be done the coming year). This task team will report to the Route Forum on progress and challenges.

Who is involved in producing the annual planning?

The task team appointed to write the plan and the route leadership will be most active in the planning process and in producing the planning document.

The involvement of members, be it less than with Route Forum members, forms a key part of the process and – if possible – a workshop should be organised for members to co-create the plan.

How to do annual planning for your route?

Your route will have many options to choose from in the format and approach of compiling the annual plan. Some of the links at the bottom of this page will lead you to using tools like the Flow Canvas One-Page Planning Tool, which are well suited for planning in purpose-driven organisations.

Other Factsheets

Also see:

- Guide: [How To Develop A Project Budget](#)
- Guide: [How To Approach Your Annual Route Plan](#)
- Guide: [How To Unite Your Route Behind A Shared Purpose or Vision](#)
- Guide: [How To Organise A Workshop For Your Annual Plan](#)
- Guide: [How To Compile A One-Page Plan](#)