

# How To Approach Your Annual Route Plan (124)

Winston Churchill is quoted as saying that “those of us who plan are bound to do better than those who do not plan, even though those who plan rarely stick to the plan”. This is why we should plan – there is something inherent to the process of planning that helps us achieve better results!

This Guide provides you with insights of what should be covered in your route plan for the year and how you should ideally go about in doing the planning.

## Why is your annual route plan important?

When we are busy making things happen, we rarely have the time to stand back and assess if we are indeed on the right path to reach the destination we are aiming for. This is why the route should put enough time aside every year to develop a well-considered year plan.

The process of producing an annual plan provides the route members with the opportunity to prioritise what should be done in the year ahead. It also offers the opportunity to ask if the route has the capacity to take on all of these plans. This may lead to difficult but essential decisions on what can be achieved with the resources available to the route.

The annual planning document provides a point of reference that is very useful for the following:

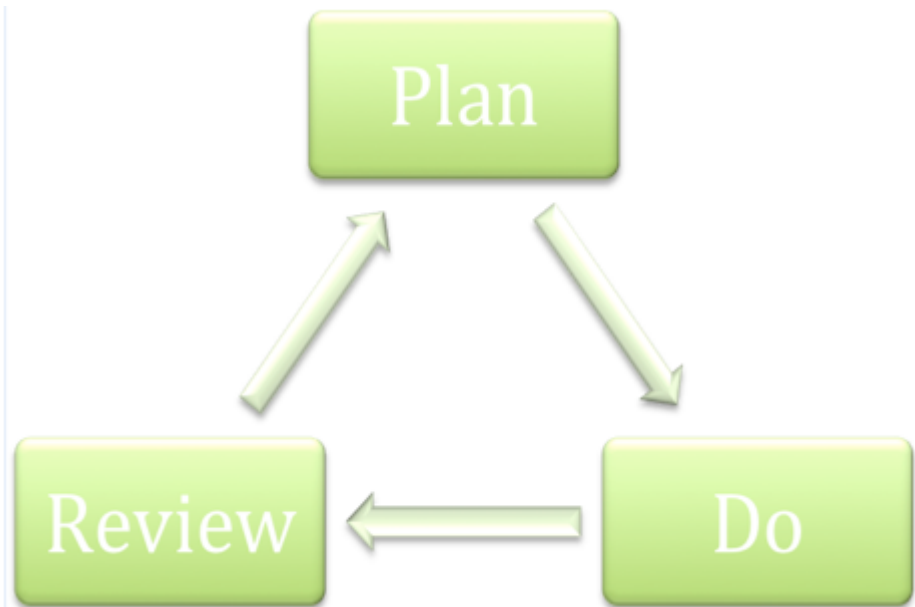
- It assigns responsibilities to individuals that they will be kept accountable for.
- It sets deadlines for achieving important milestones at different points in the year.

- It provides individuals with the authority to act on behalf of the route.
- It formalises a budget for the route to describe the anticipated income and allocated expenditure items.

The diagram below explains the cycle visually:

## What is planning?

Planning is not an aspect that should be looked at as a once-off. It is an on going activity. Planning forms part of a three-step organisational cycle, consisting of



(a) **Planning**, (b) **Doing** and (c) **Reviewing**. Good/Successful business happens in cycles... **Planning** is followed by **Doing**, which is followed by **Reviewing**, which is followed by the next cycle's **Planning**.

In this way, we see how planning fits into our activities. And as you journey through the three-step cycle, the one cycle following on the next, you get better and better at what you do and your results improve too!

In some instances, this cycle lasts for a day, or perhaps even a few hours, before you enter the next cycle of planning, doing and reviewing – but for organisations like your route, the cycle is likely to be much longer. You could, for instance, meet monthly as an executive committee to assess progress. As a executive committee, you could also do a plan

for the next month, which would then be followed by an ongoing monthly assessment. In the case of your annual plan, it could take a full year before you review and refine your plan for the next year.

‘Do’ is a powerful ingredient of success. However, it is also in the doing that we can get stuck.

Your annual plan is a documented record of the planning for the coming year ahead. It is the outcome of your route planning and has huge value for guiding your route members when they are busy doing the implementation of your route projects. The planning document also helps you when reviewing, since it provides a benchmark to assess progress against. In this way, the plan is an indispensable tool, helping you along in achieving results and realising your route’s goals.

As active citizens and entrepreneurs, we are often supportive of ambitious ideas. This is also true for what we want to achieve with our routes where we can agree about the bigger intention of the route by developing a route purpose statement (See Guide: [How to unite your route behind a shared purpose](#)).

It may not always be clear how all the doing of your route members add to achieving the route’s purpose. But when you follow the Plan-Do-Review cycle, you can ensure that during your review, you always ask how effective you are in contributing towards your purpose, and in this way, you can create better results, which you will know are congruent to your route’s bigger intentions.

While your purpose serves as a guiding light to give you direction, your immediate focus during your planning should be on the activities of the next business cycle, which in the case of an annual plan is the year ahead. Your purpose remains fairly constant over the years, but the cycles of planning, doing and reviewing are likely to shift. It is therefore very important to spend enough time on your annual plan so that you

take these shifts into account.

## The five questions for your plan

Your annual plan is essentially a business plan with a focus on the year ahead.

When you do your annual plan, think of it in a similar way you would think of a cake recipe. To bake a cake, you follow a recipe that includes a combination of flour, baking soda, butter, milk and sugar. Without these five ingredients, it would not be a recipe for cake. But one cake recipe is different from another in how these ingredients are combined and the flavour that is added. Like with a cake recipe, we can also identify the essential ingredients to include in your annual plan to ensure that you are in fact describing a complete business plan for a thriving route.

So, what are the ingredients of a business plan?

Interestingly, the essentials of a business plan are exactly the same as the five fundamental questions a journalist must answer when writing a good news article. To provide a full account of an event, a reporter must provide the reader with answers to all five these questions. These questions are:

- What?
- Who?
- When?
- How?
- Why?

These are also the five fundamental questions a good plan answers so that it explains your Why (your intention, purpose or destination) and it shows Who will do What by When and How (your actions and the best way to get there). Like with a news story, all five of these questions need attention in the planning process to create a well-considered and balanced plan. Exactly how you deal with these questions in your plan

may vary, but you must cover all five questions for each project or activity.

While we need to be thorough in covering all five questions, it is really the Why question that stands out as the foundation on which we can build our route (See Guide: [How to unite your route behind a shared purpose or vision](#)). The Why is often overlooked when we focus on the 'busyness' of life.

In your planning it is best to start with your Why – the organisational purpose. Your purpose will shape the answers to the other questions and provide cohesion to your plan.

## **Why?**

The Why question is about reflection and understanding the bigger intention or purpose of your route. In your plan, you need to be clear about the reasons for your route to exist and what you have set as the bigger objectives – perhaps even bigger than what you will be able to achieve in the next year.

But even if you are sure you will not achieve these objectives during the period you are planning for, it is important to put your organisational purpose into words so that it offers you a guiding light to show the way for the next question to ask, namely, What?

## **What?**

Clarity on the reasons for your route to exist will help you greatly in identifying what it is that the route should be planning for in the next year. Each and every activity should support your Why in very concrete ways. Many routes (specially those whose leaders are creative people) come up with many possible activities and projects. In fact, they have too many things to do and if they do not eliminate some of the ideas, will get stuck in trying to do too many things at once.

When you have too many possible activities and projects, you

can easily identify those to prioritise and those you need to park or scratch from your plans:

- First, ask yourself which of these projects or activities will contribute the most to the Why you identified for your route. Those that will make the biggest difference in reaching your route's potential are the activities and projects to put at the top of your priority list and that should receive the most attention in your annual plan.
- Second, ask yourself how these projects or activities are to be implemented and made to work. Identify those where you battle to see a clear picture of how it will happen and immediately scratch them out or park them for future attention.

The challenge in your annual planning is to identify those projects and activities to prioritise based on the outcome of the two questions above. So, when you ask: "What should we plan for?" you should be able to identify about six projects to prioritise. For most routes, this will be more than sufficient to take the route forward during the coming year.

## Who?

The Who question is about connection and activity. It is about answering the questions: "Who will make this happen" and "With whom should we connect to make this happen?"

You will notice that, sometimes, asking these questions do not lead to an answer. You may just be planning for something for which there are no people to make it happen, which in itself will be an indication that what you were planning for should perhaps not have made it to your list of projects or activities for the year.

It is useful to think about the Who question on two fronts:

- First, who will be the internal people involved – the members or staff – and who will be suitable to serve as the

project coordinator?

– Second, who are the external parties the route will have to connect with and get buy-in from to make this happen, and are they around and willing to participate?

Answers to these questions will guide you in your plans for creating of relationships and involvement of members, which will allow you to move onto the next question.

## **When?**

The When question should perhaps be called the When/Where question, since it relates to timing as much as it relates to positioning. In fact, the underlying idea relates to the value that will be created by getting your timing and positioning right. If you have identified a good What and have connected the right Who, you can take big strides forward when you get things going at the right time and the right place.

Sometimes patience is needed, since everything is not yet aligned, and other times you should not be missing a beat otherwise the opportunity may pass. This is not always easy to get right in your planning, since the conditions for success may change rapidly or what was anticipated does not happen.

When things do come together at the right time and place, you will have to deliver on What was planned, for Who, to happen by When. This then becomes the time to answer the How question.

## **How?**

The How question relates to the detailed logistics and technical requirements of delivering what was planned. All the value created in the culmination of the previous questions may come to nothing if the How question is not answered properly. This is about specifying the resources and budget needed, putting in place the systems and controls needed, and getting

down to the harvesting the fruits of answering the previous questions well.

The How question is sometimes not easy to answer, especially if it is the first time for your route to plan for an activity. This is why it is important to learn from your mistakes... to get better the next time. The How question will therefore lead you into asking the Why question again, while reflecting on how well you have done. In this way the five questions interlocks with the Plan-Do-Review cycle.

## **Who is involved in your annual planning?**

The route leadership will most definitely have the most active role in the planning process and developing the detail of the annual plan, but this does not imply that other members should be passive in the planning process.

**Much time may be saved later in the year by involving as many members as possible in the planning process. For this purpose, it would not be a bad idea to organise a half-day (or full-day?) workshop to give route members the opportunity to determine the priorities for the route. If this is not possible, other ways of getting input from members, such as an assessment and suggestions questionnaire should be considered.**

After the input from members is received, the executive committee needs to systemise the proposals and compile a



realistic plan for the year ahead. The activities should also be translated into a budget, with both income and expenditure explained in detail. A cash flow forecast is also considered an essential element of the annual plan with the Treasurer taking special interest in these aspects (see Guide: [How to develop and manage a route budget](#)).

The final version of the proposed annual plan should be approved by the executive committee before it is provided to members for their approval. It is best to submit this plan to members at the AGM, but other General Meetings may also be suitable.

When the members adopt an annual plan and the accompanying budget, these documents become the guiding framework for the executive committee to comply with during the year ahead.

The annual plan does not always give each responsible person clear instructions on the detailed tasks at hand, since the emphasis is likely to be on the outcomes you are aiming for. An action plan is a much better tool to use when it comes to making sure that the tasks assigned to people are completed (see Guide: [How to compile an action plan](#)).

## **How to do annual planning for your route**

The annual route plan is something that will be done every year.

Your founding document probably states when your financial year starts, which is practically also the best time for your annual plan to commence. For many organisations, this will be 1 March, since this date coincides with the standard tax year. But it may also be another date.

You should start the planning process at least one or two months before year-end so that you have ample time to complete

the review, make detailed plans, and compile the annual budget.

Below is a suggested planning process, which you may adjust to your specific circumstances:

1. Make the previous year's annual plan available to members, then engage them in an assessment of the performance of the route over the past year. This may be in the form of a survey or questionnaire, or you may want to organise a workshop for route members to offer their views and assessment of how the route is performing.

2. The review of the past year will lead members (either at the workshop or through the questionnaire) to suggest priorities for the coming year. It is important to remind route members of the the purpose statement as part of soliciting suggestions. The route purpose offers the bigger context for the priorities for the coming year.

3. The executive committee and project co-ordinators should assess the proposals and consolidate these into an integrated planning document, with priorities based on a reality check on what the route is capable of doing. Some suggestions will have to be shelved, because the route may not have the resources to complete all the suggested plans.

4. Next is compiling an annual budget based on the income expected from membership fees and other income-generating activities, as well as the expenditure associated with managing the route and each of the proposed projects. It may be required to reduce or even remove some projects to allow the budget to balance. It is also good practice to include a cash flow projection to the plan so that it is shown that the route will have sufficient funds throughout the coming year.

5. When the annual planning document is completed, the executive committee needs to adopt it at a properly constituted meeting. After it is adopted, the executive

committee should present the annual plan and budget to the members for their approval at a General Meeting (which could be the AGM or another General Meeting).

## Use of this Guide

This guide is ideal for offering members and executive members an introduction to planning and may be very useful in preparing members for participation in the annual planning process. It should be used along with the other Guides mentioned below.

## Other Guides

- Guide: [How To Develop A Project Budget](#)
- Guide: [How To Compile 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](#)