Operational Planning

AN INTRODUCTION

WHAT IS AN OPERATIONAL PLAN?

- The operational plan is a management tool that provides organisation personnel with a clear picture of their tasks and responsibilities in line with the goals and objectives contained within the Strategic Plan.

- A specific plan for the use of the organisation's resources in pursuit of the strategic plan.

- Details specific activities and events to be undertaken to implement strategies.

- A plan for the day-to-day management of the organisation (one year time frame).

- Operational plans may differ from year to year significantly.

- The operational plan is produced by the management and staff of the organisation.
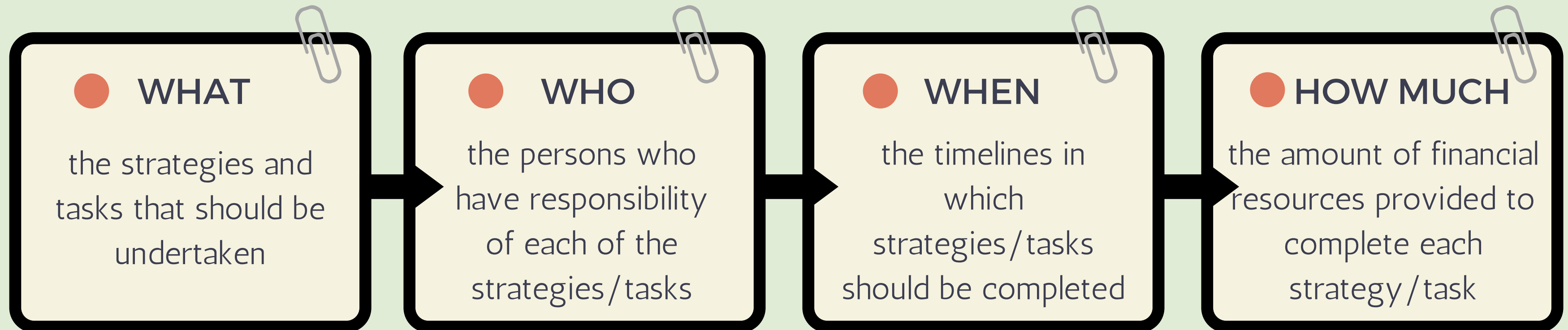
PURPOSE OF AN OPERATIONAL PLAN

- The Operational Plan present highly detailed information specifically to direct people to perform the day-to-day tasks required in the running the organisation.

Organisation management and staff should frequently refer to the operational plan in carrying out their everyday work.

PURPOSE OF AN OPERATIONAL PLAN

The Operational Plan provides the what, who, when and how much:

● WHAT

the strategies and tasks that should be undertaken

● WHO

the persons who have responsibility of each of the strategies/tasks

● WHEN

the timelines in which strategies/tasks should be completed

● HOW MUCH

the amount of financial resources provided to complete each strategy/task

DEVELOPING AN OPERATIONAL PLAN

● An Operational Plan is the next step after a Strategic Plan has been created.

● The task is to take every single strategy contained within the Strategic Plan and allocate resources, set a timeline and stipulate performance indicators.

Strategy ⟶ Allocate Human Resources
(Who is responsible?)

⟶ Allocate Financial Resources
(How much budget?)

⟶ Set Timelines
(When does this happen?)

⟶ Set Performance Indicators
(What are we aiming to achieve?)
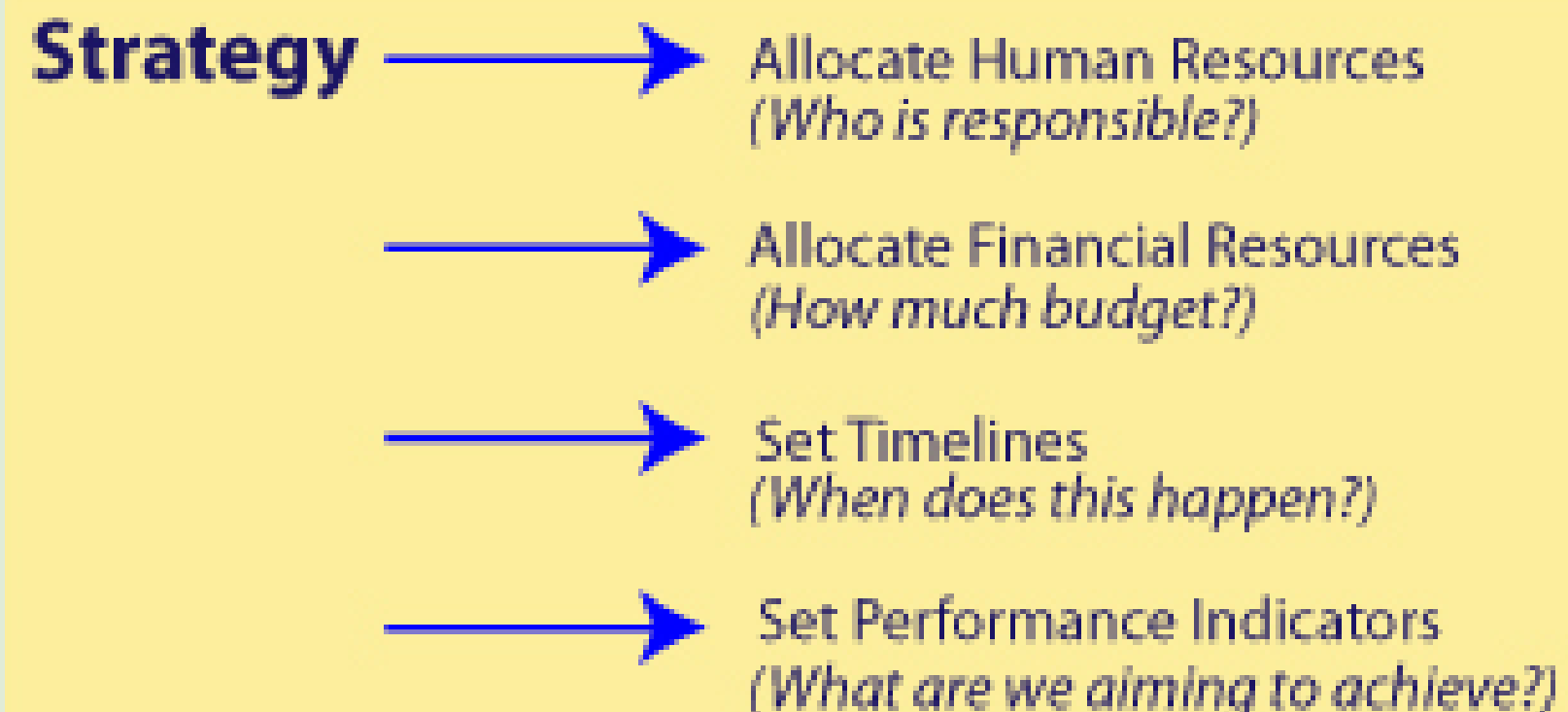
DEVELOPING AN OPERATIONAL PLAN

● **ALLOCATING HUMAN RESOURCES**

Every strategy must have an "owner" i.e. somebody has to be responsible for that strategy's implementation. If someone is not made responsible for the strategy, it is highly likely that it will not be implemented.

In the operational plan, the person responsible for the strategy is generally referred to by their JOB ROLE. For example:

STRATEGY	PERSON RESPONSIBLE
Conduct three workshops for Literacy Coaches	Coaching Director

DEVELOPING AN OPERATIONAL PLAN

- **ALLOCATING FINANCIAL RESOURCES**

  Not every strategy will require money, but most will. If people have to be paid to do work, then there will be financial resources needed for remuneration. If volunteers are involved, money may be need to be set aside for costs. Many strategies will involve administration costs such as telephone calls, printing and photocopying. Some strategies will need purchases of equipment, or materials, or promotional costs such as advertising.

  Thought must be given to all possible costs that might be incurred if a strategy is implemented. If there is an inadequate allocation of money for the implementation of a strategy, chances are it will fail.

DEVELOPING AN OPERATIONAL PLAN

● **SETTING TIMELINES**

The implementation of any strategy needs a timeline, which is the time period during which work is performed to achieve the desired outcome.

The purpose of inserting a timeline for each strategy in the Operational Plan is to give order to the tasks that needs to be done. There is always limited resources and therefore, at any given time, decisions need to be made as to priorities and where work effort should be focused. For example:

STRATEGY	TIMELINES
Submit application for Government funding of literacy programs	Costing completed by 30 March 2013 Submit application by 30 June 2013

DEVELOPING AN OPERATIONAL PLAN

● *SET PERFORMANCE INDICATORS*

Performance Indicators (or Key Performance Indicators) are established and used as an integral aspect of the business planning and monitoring processes.

They are a standard or reference point that allows management to measure the actual result of strategies and make comparisons between desired results and actual results. For example:

STRATEGY	PERFORMANCE INDICATOR
Conduct three workshops for Literacy Coaches	20 Literacy Coaches attending
Host parenting workshop	100 parents benefitting

IMPLEMENTING THE OPERATIONAL PLAN

All staff should be aware of the existence of the operational plan, its purpose and why it is important to them.

To ensure that there is sufficient understanding of the operational plan, management must thoroughly communicate the operational plan to staff.

Communication strategies can include:

- staff/team meetings in which senior management are engaged in explaining key aspects of the operational plan and answering questions that staff raise about the plan

- a breakdown of the overall operational plan into subsets and communication of each subset to the responsible work team or section. This enables the work team to more clearly understand, and be focused on, their part in implementing the whole plan

- training for staff to better understand their tasks and responsibilities , and especially how they can contribute to the overall achievement of the operational plan

IMPLEMENTING THE OPERATIONAL PLAN

The implementation of the Operational Plan requires management to regularly monitor achievement and exert control to reduce any variance from the plan.

This control by managers involves:

- investigating on a regular basis of what has been achieved, and what has not

- implementing corrective action where tasks are not achieved, or achieve on time

- checking that resources will be available when needed

- supervising, supporting and motivating the people of the organisation to ensure tasks are undertaken

- adjusting the operational plan if there is a need

- reporting problems to superiors e.g. directors, committee personnel, the Board Members of the organisation

OPERATIONAL PLAN TEMPLATE

This template will help to:

- list strategies and/or work tasks
- stipulate performance indicators
- allocate responsibility
- set timelines and budget
- provide a budget summary

GOVERNMENT OF JAMAICA
[Insert Name of Ministry, Department or Agency here]
OPERATIONAL PLAN
[Insert Planning Period here eg. 2022-2023]

PROGRAMME:	[Insert name of programme]	
OBJECTIVE:	[Insert objective(s) of the programme]	
SUB-PROGRAMME:	[Insert name of sub-programme]	
OBJECTIVE	[Insert objective(s) of the sub-programme]	
National Goal:	Sector Outcome:	Budget No.: Budget:
National Outcome:	Contributing GOJ Strategic Priority:	

Major Activity/ Initiative [projects, policies etc.]	Intended Results	Performance Measure	Baseline (2018/2019)	Projected (Targets) and Expenditure (J$'000)								Functional Agency/Dept / Division
				QUARTER 1		QUARTER 2		QUARTER 3		QUARTER 4		
				Target	Cost	Target	Cost	Target	Cost	Target	Cost	
OUTPUT												
[Insert name of activity/ initiative]	[State the results/ change expected from implementation of the activity]	[State how the performance of the activity will be measured]										
[Insert name of activity/ initiative]	[State the results/ change expected from implementation of the activity]	[State how the performance of the activity will be measured]										
INPUT [NB. Provide at least one input measure for the Sub-programme that the major activities fall under]												
[State Input component]	[State the results expected from mobilising the inputs]	[State how the efficiency of the input will be measured]										

REFERENCES

http://www.leoisaac.com/operations/top025.htm