

# Wales Council for Voluntary Action

Supporting charities, volunteers and communities

## 1. Getting started

### 1.4 Planning your work



## Making a plan

Once your group is going, it is time to draw up a simple work plan. This is sometimes called a business plan or a strategic plan. This will tell your members, supporters, and other interested people, what you are doing, why, and how you will go about it. You may need a plan if you are applying for funding.

Your plan should include and explain:-

- What your group intends to do
- How it intends to do it
- The resources it has available (e.g. people's time and support; any special skills; money; equipment; use of premises etc)
- Any further resources it needs, and how it hopes to find them (e.g. by recruiting volunteers or raising funds).
- When it hopes to do these things

Drawing up a plan will help you to decide on priorities. For example, it might show that you have the resources to start one activity, but not another; or that you need more funds before you can recruit volunteers. The plan will also mean that you can measure your achievements because you will be able to compare it with what the organisation has actually done.

## Working together as a group

Now you have found several other interested people, you need to talk this over with them, and begin to sort out what you plan to do and hope to achieve. At this stage you are learning to work together as a group. It is important to allow plenty of time for discussion.

Even in small groups, there will be different points of view. If you discuss these fully and openly, you may be able to reach agreement, which is the best basis for going ahead. The more you understand each other's views, and respect them, the better you will work together.

A good start is to discuss what the issue or problem is that you are trying to tackle. Do not be surprised if you see it in different ways and it's worth finding out why this is. It could be that you have different values; a different perspective on the issue; or you

may have different information, or a lack of information. Always be aware that not everyone will be thinking exactly the same as you!

It's also worth remembering that different people will bring different talents to the group. Some may be good at working together but not so good at organising. Some people will have more time to offer than others. It's also worth noting that people join groups for a wide range of reasons – some join to develop new skills, meet other people or have a desire to work with like minded people. It's useful to find out why people want to join your group so that their skills can be used in a way that suits them and the group. It will also ensure that those who join the group will enjoy being involved.

## Rules or constitution

You may also, at this stage, think about putting together some rules for your group to agree. The rules should outline what the group wants to do and how it is going to operate. This is normally called a constitution – don't be put off by the name. It's a legal term and staff at your local County Voluntary Council will be happy to help you put a draft one together. Most funders will not fund a group if it doesn't have a constitution. Please see our information sheet *1.5 Choosing legal structures* for more information.

## Aims and objectives

Or in other words, what are you going to do, and how are you going to do it?

**Aims:** Describes the purpose of your group, what you want to achieve.

**Objectives:** Describes the way in which you will achieve your aims in the long term.

## Planning tools & techniques

These useful tools and techniques have been developed in the private sector, but can work just as well for voluntary organisations. The difference is that, generally speaking, where the private sector says products and profit, the voluntary sector says services and benefits to the community.

## SWOT analysis

Internal factors: Strengths & Weaknesses

- Identify your organisation's **strengths**: e.g. staff, volunteers, your service, location, premises, public profile...
- Identify your organisation's **weaknesses**: e.g. lack of staff or volunteers, lack of skills, inadequate equipment, poor IT, poor publicity...

## External factors: Opportunities & Threats

- What **opportunities** are there for your organisation: e.g. growing demand for your services, new funding sources, new legislation, changing government policies?
- What **threats** does your organisation face: e.g. competition for resources, potential funding cutbacks, changing government policies, new legislation?

Note how the same issue can be both a strength *and* a weakness, or an opportunity *and* a threat.

Incorporate the results of your SWOT analysis into your plan.

Make sure that your plan:

- compensates for every weakness
- makes the most of your strengths
- neutralises every threat
- takes maximum advantage of your opportunities

## Product cycle analysis

In the commercial world products and services have a lifecycle. A new product sells slowly at first, builds up, reaches a peak, then sales plateau and eventually decline as the market reaches saturation point, or as new products replace it. The same pattern can be found in the voluntary sector too. A voluntary organisation's market is those sections of the community that its services aim to benefit.

You can apply product cycle analysis to any area of your activity – e.g. the services you provide, your fundraising campaigns, sources of revenue funding. You can't assume any of these will carry on indefinitely at the same level. Check each of your main activities in terms of its lifecycle.

Four stages of the product cycle

Stage 1: new service on the market

When you launch a new activity you may have to create a demand for it, or the demand is there but in relatively small numbers at first. You also often have to raise funds for a new service.

Stage 2: market growing

You're gaining users for your service, or funding for it is growing.

Stage 3: market peaking & becoming saturated

Numbers of users, or funding from certain sources, levels off.

## Stage 4: market declining

Numbers of users decline (perhaps because their needs change); you suffer funding cutbacks or the funding period simply comes to an end; or your fundraising activities produce such low yields it's not worth the effort anymore.

The purpose of product cycle analysis is to anticipate when a service or source of funding will reach its peak and level off, so that you can change direction or replace it before it goes into decline.

## Portfolio analysis

This technique identifies and places the services and projects your organisation offers within the portfolio matrix (a.k.a. Boston Matrix) shown below. It helps you identify where you should invest your time, energy and resources.

You can apply portfolio analysis to your sources of fundraising too.

<p>High Yield</p> <p><b>STARS</b></p> <p>Strong, popular projects or services with real potential for growth</p>	<p>Low Yield</p> <p><b>QUESTION MARKS</b></p> <p>New or innovative projects, but not yet proven</p>
<p>High Yield</p> <p><b>CASH COWS</b></p> <p>Reliable services that give the organisation security</p>	<p>Low Yield</p> <p><b>DEAD DUCKS</b></p> <p>Services past their use-by date-no longer worth the resources they take up</p>

## Ideas storming

A great way to start thinking creatively about future new directions. It involves everyone, records the group's thoughts in a random order, can throw up good new ideas, and it's fun. Be open-minded, be non-judgemental, and accept all ideas. You can analyse and be selective later on.

## Tips for successful planning sessions

- Set aside time to plan – and give yourselves plenty of it – you may be able to draft a plan in half a working day, but most organisations need longer.
- Plan the agenda for your planning sessions carefully in advance.
- If possible hold your planning sessions in a fresh environment, not your usual meeting place – a change of scenery can be stimulating, can encourage new ideas, and can help to get people out of habitual ways of thinking.
- Get away from interruptions, phones and mobiles.
- Timetable coffee and meal breaks – arrange for food and refreshments if possible.
- Decide who takes part in the planning sessions – if you can't involve everyone in your organisation, decide how you will consult with them and give feedback.
- Choose a good leader to take you through the planning process – this could be your Chairperson or an outside facilitator.
- Give the task of producing the plan to a key person or small working group.

If you choose to use a consultant for strategic planning, make sure that you maintain control. Use your consultant as an advisor.

### Disclaimer

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

### For further information contact

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