



Engagementworks

Community Engagement Basics

Session 8 – Video 1

Planning for Community Engagement

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Introduction



In this lesson we talk about the importance of planning and cover –

- why planning is important
- the difference between an organisational engagement strategy and a project engagement plan
- how organisational plans and project plans fit together
- how engagement plans and project plans fit together

Why Planning is Important

There are a whole lot of reasons why planning is important. It -

- **Increases efficiency:** Planning makes optimum utilization of all available resources. It helps to reduce wastage of important resources and avoids their duplication. It aims to give the highest returns at the lowest possible cost. It thus increases the overall efficiency.
- **Reduces business-related risks:** There are many risks involved in any modern business. Planning helps to forecast these business-related risks. It also helps to take the necessary precautions to avoid these risks. Thus, it reduces business risks.



- **Facilitates proper coordination:** Often, the plans of all departments of an organization are well coordinated with each other. Similarly, the short-term, medium-term and long-term plans of an organization are also coordinated with each other. Such proper coordination is possible only because of efficient planning.
- **Aids in organizing:** Organizing means to bring together all available resources, i.e. 6 Ms. Organizing cannot be done without planning. This is because planning tells us how much resources are required, when it is required. This means that planning aids in organizing.
- **Gives right direction:** Direction means to give proper information, accurate instructions and right guidance to the subordinates. Direction cannot be done without planning. This is because planning tells us what to do, how to do it and when to do it. Therefore, planning helps to give right direction.





- **Keeps good control:** With control, the actual performance of an employee is compared with the plans, and deviations (if any) are found out and corrected. It is impossible to achieve such a control without right planning. Therefore, planning becomes important to keep a good control.
- **Helps to achieve objectives:** Every organization has certain goals or objectives or targets. It keeps working hard to fulfil these objectives. Planning helps an organization to achieve these objectives, but with some ease and promptness. Planning also helps an organization to avoid doing some random (done by chance) activities.
- **Motivates personnel:** A good plan provides various financial and non-financial incentives to both managers and employees. These incentives motivate them to work hard and achieve the objectives of the organization. Thus, planning through various incentives helps to motivate the personnel of an organization.
- **Encourages creativity and innovation:** Planning encourages managers to express and/or use their creativity and innovation. This brings satisfaction to the managers and success to the organization.



- **Helps in decision-making:** A manager makes many different plans. Then the manager selects or chooses the best of all available plans. Making a selection or choosing something means to take a decision. So, decision-making is facilitated by planning.

A Planning Hierarchy

In any well-ordered organisation there is a hierarchy of plans all of which are connected in some way to form an overall picture of its operations. It's a bit like the pieces of a puzzle. Once they have all been correctly placed they form a coherent picture that can easily be recognised.

Below is a hierarchy of high level plans beginning with the strategic vision flowing on to policies, action plans and project plans.

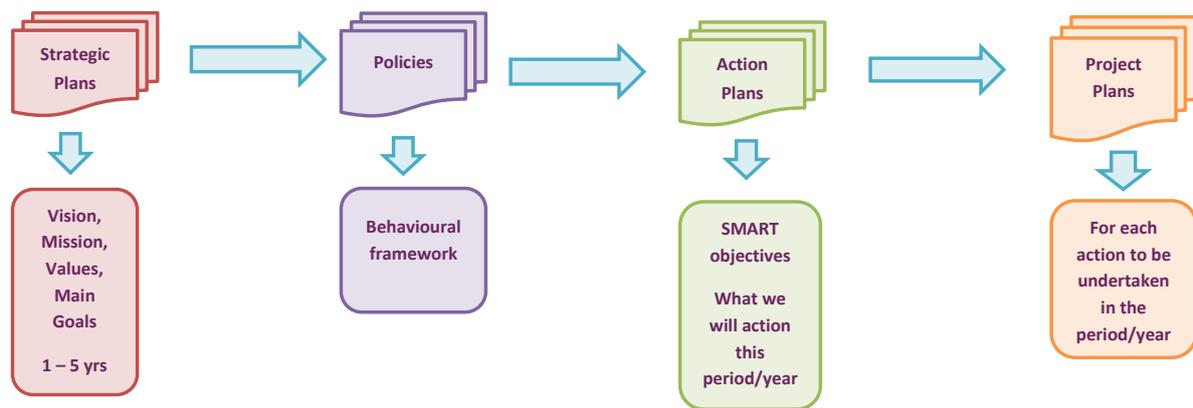
We are going to briefly talk about each of these levels.

Before proceeding further it is important to understand that different terminology may be used in your organisation and there may be overlaps between different levels and in addition you may have more or less planning levels than in this diagram.

What is absolutely vital is that you should be able to connect the dots all the way through regardless of the number of steps and language used to describe each step.



Hierarchy of Plans



Strategic Plans

The strategic plan is where you will usually find the vision, mission, values and main goals.

But it is much more than that.

Strategic planning is big picture stuff. This document is your organisation's roadmap. It looks forward in time to a future desired state that you want to achieve.

How will we look in the future?

In a local authority context here in New Zealand this could be the Long Term Plan which has 10 year horizon.

In a SOE or business it could be the statement of corporate intent.

Without this plan none of the others will make much sense.



Policies

Policies and to a lesser extent practises, establish an organisation's operating framework.

They give clarity and consistency in the way different operations are performed.

They also give certainty to stakeholders and communities in the way they can expect an organisation to behave.

They are in effect a set of guiding principles that connect the strategic vision of the organisation to its action plans.

In a New Zealand local government context a good example would be the Significance and Engagement policies that councils are legally obligated to adopt. Properly developed these clearly set out how decisions to be made will be assessed for significance and what community engagement processes will then follow.



For a private sector organisation their terms of sale could set out there policy for pursuing unpaid accounts.

Action Plans

The action plan could also be thought of as the annual business plan.

These are the specific things that will be undertaken this year to help achieve the strategic vision. They will be guided by the organisations policies.

The actions will be in the form of SMART objectives –

- Specific – target a specific area for improvement.
- Measurable – quantify or at least suggest an indicator of progress.
- Assignable – specify who will do it.
- Realistic – state what results can realistically be achieved, given available resources.
- Time-related – specify when the result(s) can be achieved.

There are other variations of SMART but we will stick with this version.

Depending on how many main goals there are in the strategic plan it may not be possible to develop action plans for all of them each year.

What is most important is that the action plan objectives directly connect to the main goals in the strategic plan.



Project Plans

Project plan is a key document or documents used to define how a project will be managed

It includes -

5W + 2H

5W = who, what, when, where & why

2H = how & how much

This could include a series of plans covering such things as –

- Finance
- Communications
- Community/stakeholder engagement
- Building
- Construction
- Timelines
- Reporting lines
- Personnel
- Purchasing



There may be more than one project connected to a particular objective.

Planning to Engage

Now that you can see what the main plans are and how they are inter-connected you need to put this into a community or stakeholder engagement context.

When you are planning to engage you need to consider –

- The issue – who will impact on and be impacted by this
 - Legislative requirements – what are our legal obligations
 - Engagement objectives – what do we need from our stakeholders – engage early
 - Political sensitivities – who, what, when
 - Project stage – don't engage on what's already done
 - What's in scope and what's not – don't set false hope by engaging on decisions that have already been made or are non-negotiable, such as legally binding.
- Available resources – allocate a sensible budget, good engagement has a cost but is less expensive than bad or non-engagement.



Conclusion

The focus of this lesson has been on setting the scene for developing a project engagement plan.

By understanding the planning process, its components and their relative importance the stage is set to select your own project and develop an engagement plan following the step-by-step process in session 9.

