Section 2 **Planning**

Checklist

Step 1 Create an action plan. Create a risk assessment.

We have:	Yes or No?	Actions we need to take	Completed on (date)
An action plan			
A risk assessment			
Regular times when we update our action plan and risk assessment			

Step 2 Create a plan

We have:	Yes or No?	Actions we need to take	Completed on (date)
A plan – using the CES planning triangle©			

Step 3 Create a business plan

	Yes or No?	Actions we need to take	Completed on (date)
We have created a business plan			
We can show that our plan is used by our Board, staff and volunteers			

Step 1 Create your plan

How can planning help us?

A plan is important because it helps:

✔ staff and volunteers understand the difference you are trying to make and the importance of what they do. It also helps to create a shared sense of ownership.

✔ make clear to the people who use your services how you are trying to help them and why

✔ you show those who make donations, award grants or other funding the difference you are going to make with the money they give you.

✔ you see the steps you need to take towards changing things for the better.

✔ to measure and show the difference you make as an group or organisation.

An Action Plan

An **action plan** covers **actions**, **people involved** and **calendar dates**. You can use it at your meetings to check progress, agree what you will do and make changes if your want to improve your service or prevent something going wrong.

Example - an Action Plan

You can take out the example information from the grid below and fill this in with your own information. The terms are explained using the CES planning triangle© on page 23.

Overall Aim	To maximise the potential of 14-19 year olds interested in sport and dance in Wolverhampton
Specific Aim	To increase opportunities for young people to lead sports and dance activities
Area of activity	Run weekly sports activities at Beginner, Intermediate and Advanced level
Output	Table tennis classes on Wednesdays and Fridays

Action	Who will do this?	By when?	Date checked or changed
Hire a table tennis coach (include DBS checks)	Andy, Maxine	10 June	✔ Completed
Find a venue	Catherine	17 June	Usual venue not available, calling other venues. New date to complete - 20 June
Create a flyer	Manjeet, George	23 June	
add more of your own actions...			

Risk Assessment

A **risk assessment** lists potential problems or dangers that stop you achieving your goals.

You can decide how serious they are and take action to avoid or reduce these risks if you need to.

What happens if...?	Action we will take
We can't find a suitable coaches	■ Ask other sports charities, local table tennis clubs, the national governing body for table tennis, your local leisure centre
Our usual venue is not available or there is a price rise	■ Create a list of other venues that we can afford and use this alternative list if necessary.
Young people don't come regularly	■ Review how your classes are run to see which improvements are needed ■ Ask young people why they don't come regularly ■ Introduce a loyalty scheme (non-financial reward)

You can also rank, or number, the risks in order - How likely are they to happen? How important are they if they do happen? This can help you prioritise which actions to concentrate on.

Step 2 Create a plan

Here is a way of thinking about planning - use a CES planning triangle©. This idea has been developed by the **Charities Evaluation Service (CES)** and is used with their permission. The CES website is full of **useful case studies** .

One of the helpful things about the CES Planning Triangle© is that it stops us using too many words: the more words we use the less clear things often become.

We have explained the triangle and then used an example. It may be easiest to understand if you look at both pages side by side. The jargon is explained at the bottom of the page, the questions are shown on the left hand side of the page.
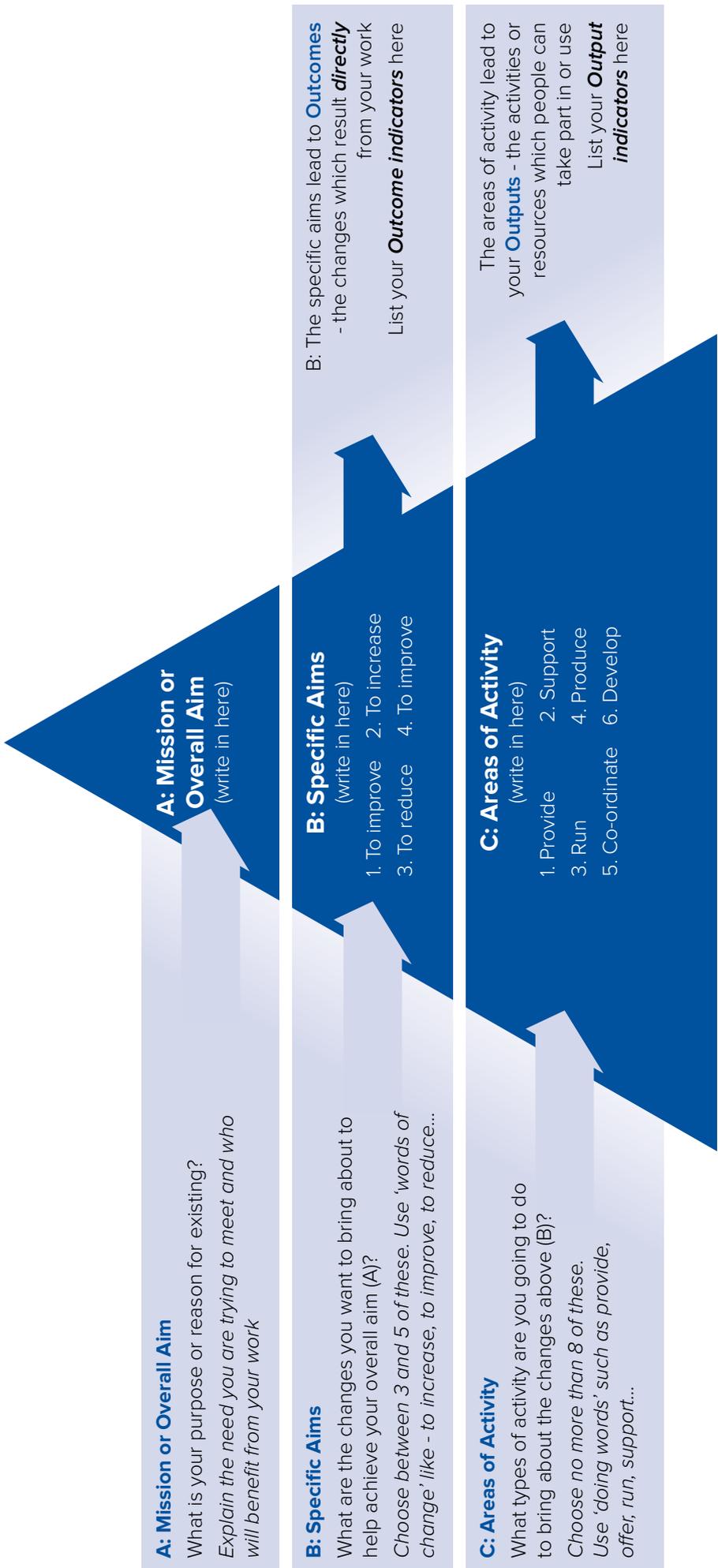
Work with your group to answer the questions and you will have created a simple plan that will help you understand what you need to do. It will help others understand why you group exists and how they can support. The planning triangle can also become the basis of your business plan, page 25.

> **Example - 'Take the Lead' Dance and Sports Group**
>
> You have brought together a small voluntary group of local people who want to help young people who have low ambition and confidence in your local area. You want to change this to help the young people maximise their potential. Your project name is 'Take the Lead'.
>
> The planning triangle - as well as the previous and action plan and risk assessment use this example

Create your very own Action Plan

A: Mission or Overall Aim
(write in here)

B: The specific aims lead to Outcomes - the changes which result *directly* from your work

List your *Outcome indicators* here

B: Specific Aims
(write in here)

1. To improve   2. To increase
3. To reduce   4. To improve

The areas of activity lead to your Outputs - the activities or resources which people can take part in or use
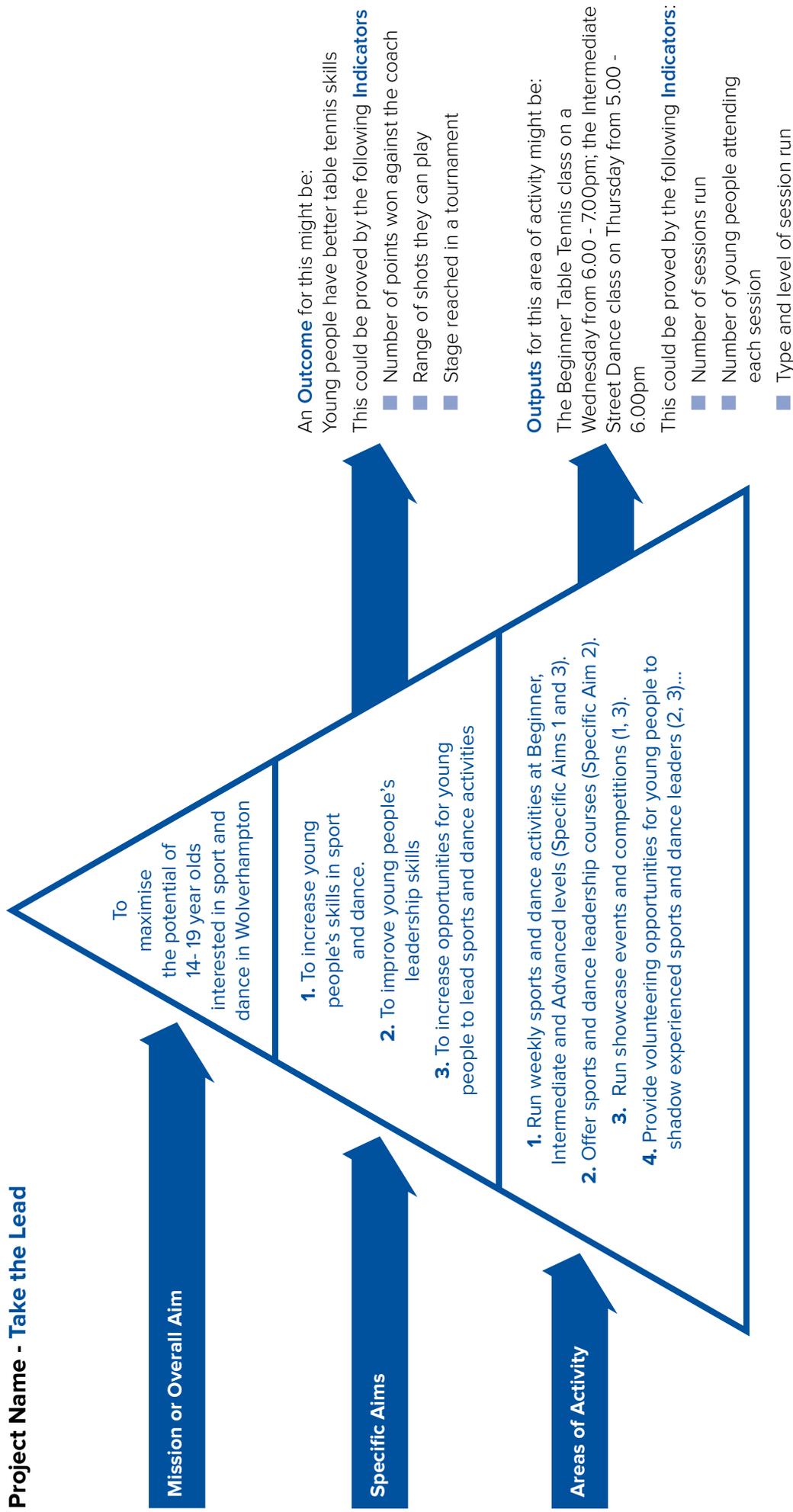
List your *Output indicators* here

C: Areas of Activity
(write in here)

1. Provide   2. Support
3. Run   4. Produce
5. Co-ordinate   6. Develop

A: Mission or Overall Aim
What is your purpose or reason for existing?
Explain the need you are trying to meet and who will benefit from your work

B: Specific Aims
What are the changes you want to bring about to help achieve your overall aim (A)?
Choose between 3 and 5 of these. Use 'words of change' like - to increase, to improve, to reduce...

C: Areas of Activity
What types of activity are you going to do to bring about the changes above (B)?
Choose no more than 8 of these. Use 'doing words' such as provide, offer, run, support...

The support organisations can talk this through with you. Contact Youth Organisations Wolverhampton, page 54

See the example on the next page to show how this works in practice.

Planning Triangle, modified from
CES Planning Triangle©

Jargon Explained

Mission or Overall Aim	Why a group or project exists and the overall change it want to bring about.
Specific Aims	Particular changes or differences the project or organisation plans to bring about for its users.
Outcomes	The individual changes or benefits and learning that result from what the project or organisation does.
Outputs	The individual services, resources or facilities that the organisation or project provides.
Indicator	Something that can be measured that gives a clue that a change (outcome indicator) or an activity (output indicator) has taken place.

Project Name - Take the Lead

Mission or Overall Aim

To maximise the potential of 14-19 year olds interested in sport and dance in Wolverhampton

Specific Aims

1. To increase young people's skills in sport and dance.
2. To improve young people's leadership skills
3. To increase opportunities for young people to lead sports and dance activities

Areas of Activity

1. Run weekly sports and dance activities at Beginner, Intermediate and Advanced levels (Specific Aims 1 and 3).
2. Offer sports and dance leadership courses (Specific Aim 2).
3. Run showcase events and competitions (1, 3).
4. Provide volunteering opportunities for young people to shadow experienced sports and dance leaders (2, 3)...

An **Outcome** for this might be:
Young people have better table tennis skills
This could be proved by the following **Indicators**
- Number of points won against the coach
- Range of shots they can play
- Stage reached in a tournament

Outputs for this area of activity might be:
The Beginner Table Tennis class on a Wednesday from 6.00 - 7.00pm; the Intermediate Street Dance class on Thursday from 5.00 - 6.00pm
This could be proved by the following **Indicators**:
- Number of sessions run
- Number of young people attending each session
- Type and level of session run

Step 3 Create a business plan

1. Why create a business plan?

A business plan can help you:

- **Achieve your big ideas** - breaking them down into manageable, measurable steps.
- **Get others involved** - Potential supporters are more likely to share their time, money and expertise if you have clear information about your plans to hand.
- **Be prepared for the future** - manage the risks and prioritise the workload, so you know when to say "yes" or "no" to new opportunities

You may not feel like a business - but the actions your take will be similar and the language used is well understood.

2. What should go into the plan?

Below is a template of a standard business plan. Write your own information in the sections under the different headings. Tick off a section when it is complete.

☐ **1. Cover page and contents**

Business Plan

- Name of organisation.
- Type of organisation e.g. Unincorporated or Incorporated, plus company description, page 14 onwards.
- Your contact name, phone number, email and address.
- Website address, if you have one.
- Contents of the Business Plan - list your section headings with their page numbers.

☐ **2. Summary**

Complete this at the very end - it is a summary of what you've already included later in the plan.

Explain the main points of your plan:

- Who are your group?
- Why did you set up? What has happened so far?
- What do you do?
- What would you like to do?

☐ **3. Background and Services**

- Start date and key dates.
- Number of staff and volunteers.
- Project names and the difference your organisation has made.
- Places where you work.
- Your work - services and products you provide.
- Income.
- Local and other links - organisations and projects you work with.

☐ **4. Mission, Aims, Outcomes and Outputs**

The CES Planning Triangle© is a useful exercise to help you understand these terms/ideas and your plan. List your:

A: Mission - Why your group or project exists and the overall change it want to bring about. A summary of the overall difference your group wants to make.

B: Specific Aims - Particular changes or differences you bring about for your users. Link these to your Outcomes (below):

C: Outcomes - The changes, benefits, learning or other effects that result from what you make, offer or provide. Link these to your Outputs (below):

D: Outputs - The individual services, resources or facilities that the organisation or project provides.

Monitoring - How and when you will measure your outcomes and outputs.

Evaluation - How you will learn from your monitoring.

Indicator - Something that can be measured that gives a clue that a change (outcome indicator) or an activity (output indicator) has taken place.

Wolverhampton support organisations can put you in touch with an Outcomes Champion who will explain more. Contact YOW or WVSC for details, page 54.