

The Planning Process



1. Preparation

a. Organizing and Staffing

b. Training

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Preparation for Strategic Planning




Knowledge Based Society

- 1. Growth**
- 2. Change**
- 3. Technology**
- 4. Globalization**
- 5. Conflict**



*** The well being of the individual citizen is clearly and closely related to the quality and level of performance of these organizations.**

****How well an organization operates depends on its capability to mobilize the components of its strategic management.**

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- 1. Design its strategic plans**
 - 2. Install a flexible structure that facilitates decision making and flow of communications**
 - 3. Wisely allocate resources for plans, programs and projects**
 - 4. Implements, monitors, and evaluates outputs to determine whether pre-determined goals and objectives are attained or not.**

*****The responsiveness and effectiveness of the strategic plans depend on a thorough conduct of scientific and systematic analyses of the external environment, internal organization, the organizational culture, values and beliefs, and the accumulation and assurance of adequate resources.**



Strategic Planning Process

- 1. Holistic**
- 2. Bottom-up**
- 3. Democratic**
- 4. Participative**



Considerations:

- 1. Available resources**
- 2. Knowledge**
- 3. Capability of top executives of the organization**



Preparing the Plan

Requirements:

- 1. Sterling Leadership**
- 2. Unwavering commitment on the part of the decision making**
- 3. Active participation of middle-level managers and rank and file**



3 *Concepts or Dimensions in Strategic Planning*

1. Conceptual/literal state-implies knowledge and its meaning

***First two sub-step in strategic planning
process falls under this dimension.**

**Strategic Planning –a course of action
designed to achieve common desirable ends**



2. Process – Going through the motion of actually preparing the plan

- a) Commencing with environmental scanning**
- b) Visioning**
- c) Mission/goal/objective setting**
- d) Strategies/policies formulation
Program/project Identification**
- e) Budgeting**
- f) Printing it into a document 4**

**** Steps two to seven of the model fall in this category.**

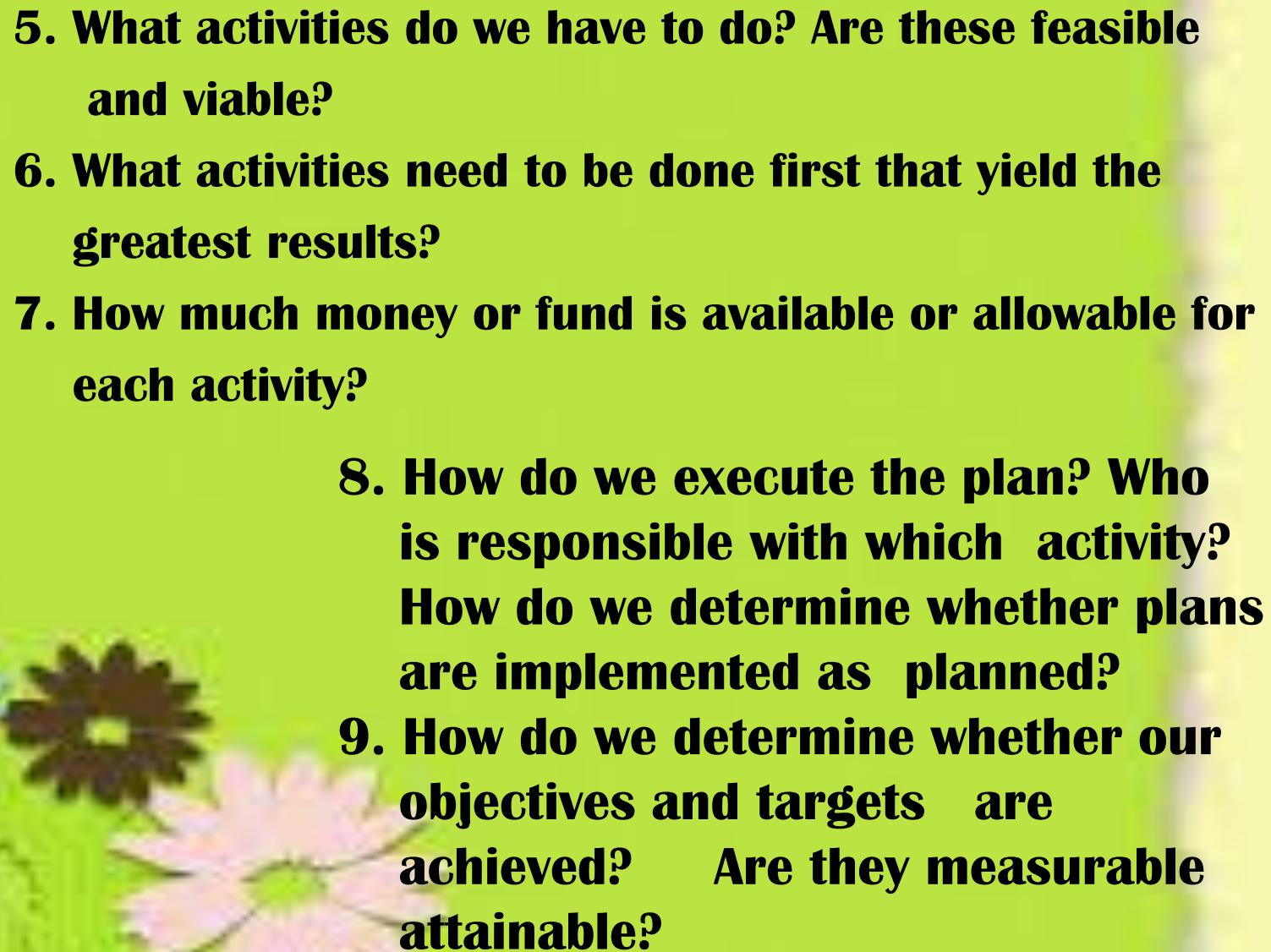
3. Praxis – the combination of theory and practice.

- major actors and participants in the development effort are required to synthesize and internalize conceptual and procedural dimensions of strategic planning through the implementation of programs and projects as reflected in the plan and their monitoring and evaluation in accordance with stipulated goals and objectives.



Key Questions whenever WE are ENGAGED in PLANNING (NEDA,1985)

1. a. What are the new developments in the educational milieu? Shall we just see them pass? Shall we welcome together and plan this changes to happen?
b. Are we knowledgeable and competent to plan these changes to happen? Do we possess the proper values and attributes to do planning?
2. Where are we now? What resources are available at our disposal?
3. Where do we want to go from here? What do we want be?
4. How do we get there? What values shall we pursue?

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- 5. What activities do we have to do? Are these feasible and viable?**
 - 6. What activities need to be done first that yield the greatest results?**
 - 7. How much money or fund is available or allowable for each activity?**
 - 8. How do we execute the plan? Who is responsible with which activity? How do we determine whether plans are implemented as planned?**
 - 9. How do we determine whether our objectives and targets are achieved? Are they measurable attainable?**

*****Steps 8-9 reflect this dimension**

Preparation

Organizing and Staffing

-The first phase in planning process. It seeks to answer the following questions: “What are the new developments in the educational milieu? “Shall we just see them pass? ”Shall we organize and plan this changes?

Organizing

-process by which the structure and allocation of jobs and functions are determined?

- It is job-oriented.



3 types of organization (accdg. To the nature of authority vested in the position)

1. Line

- The simplest type in which a particular position had general authority over lower positions in the hierarchy.**
- Said position is vested with power and authority.**

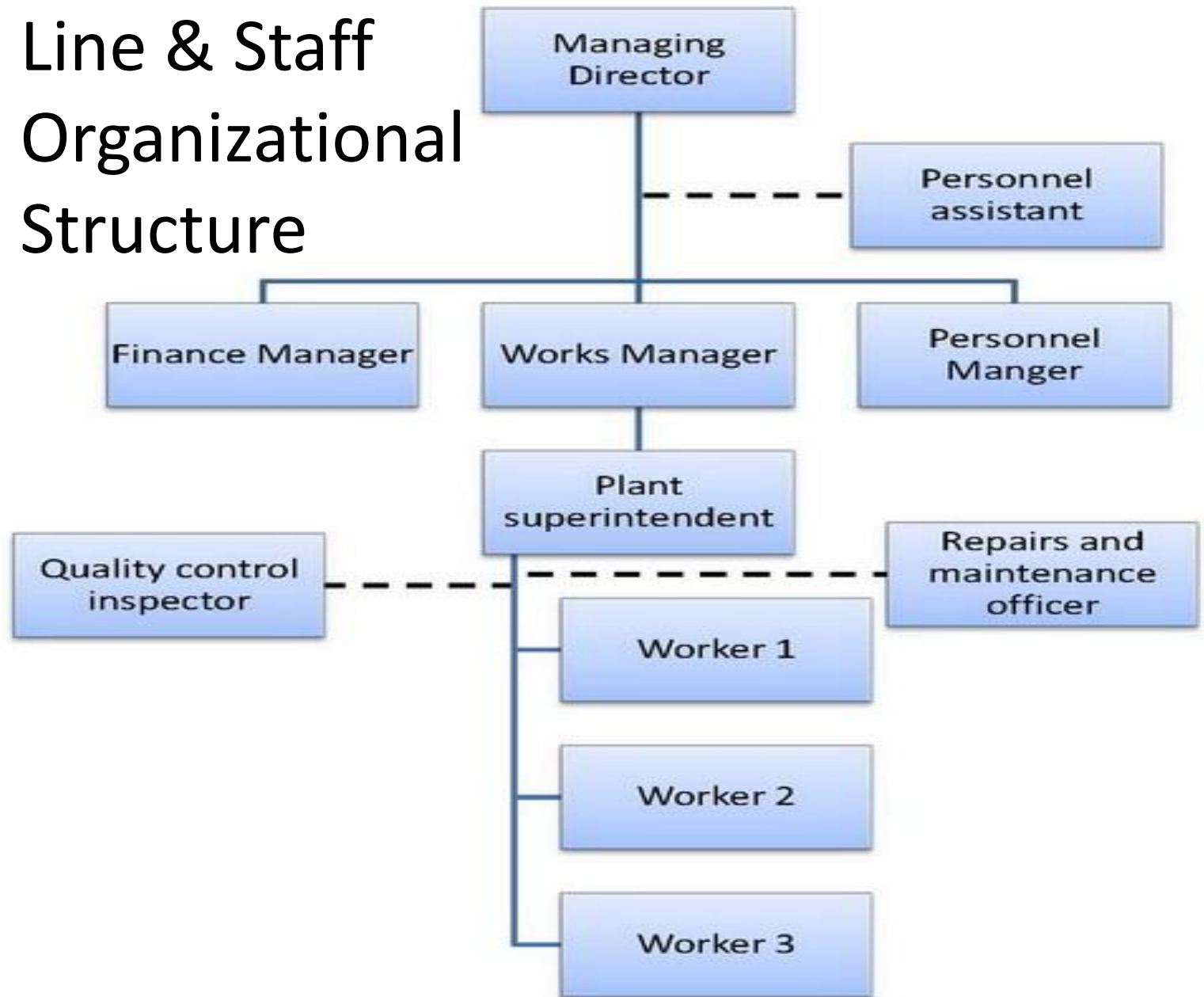
2. Staff

- Purely advisory and recommendatory to the line position with no authority to execute recommendations into action**

3. Functional

- Developed due to increasing complexity of operations and the need for a great number of specialists.**
- Permits a specialist in a given area to enforce his directive within a limited and clearly defined scope of authority.**

Line & Staff Organizational Structure

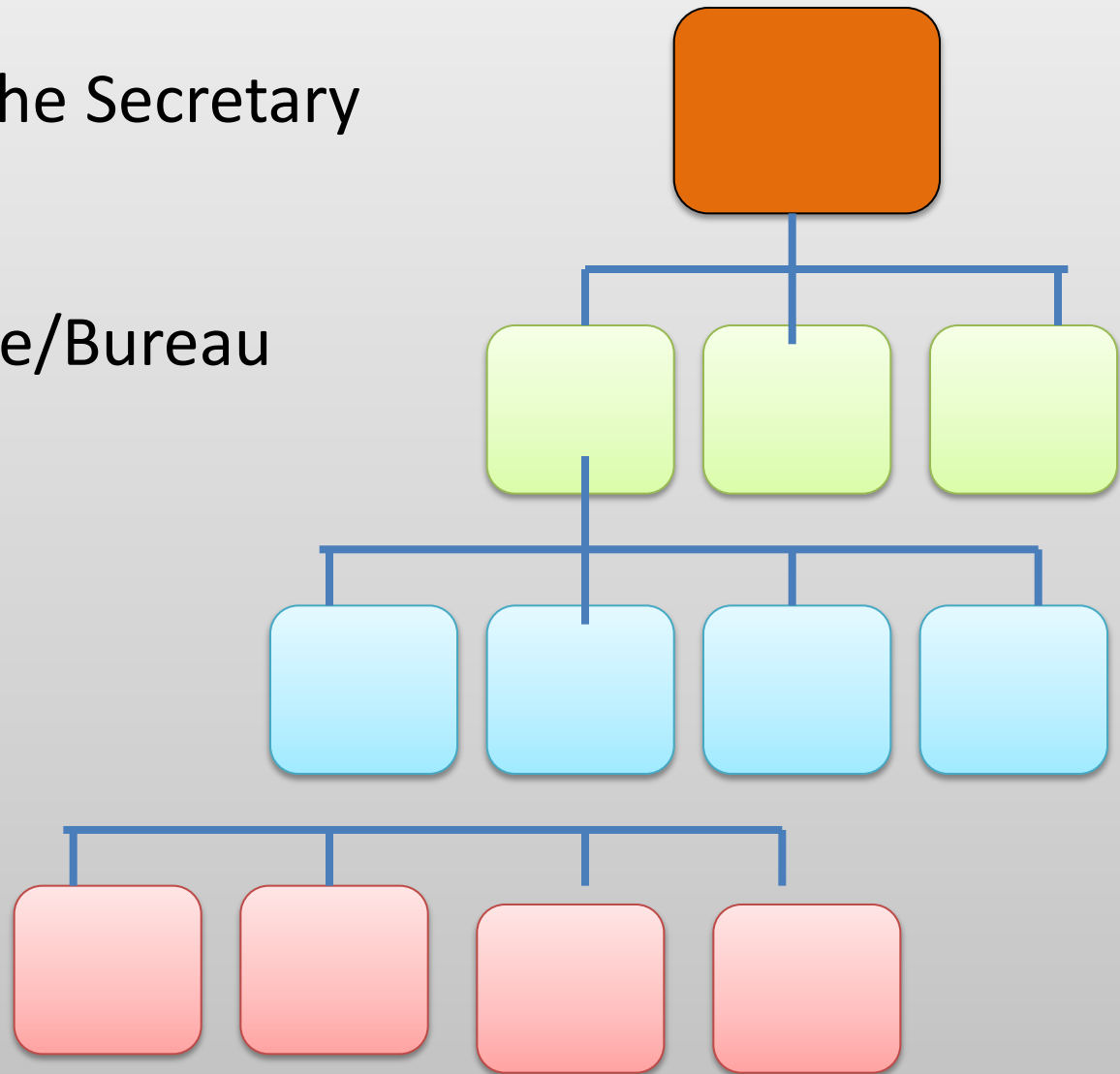


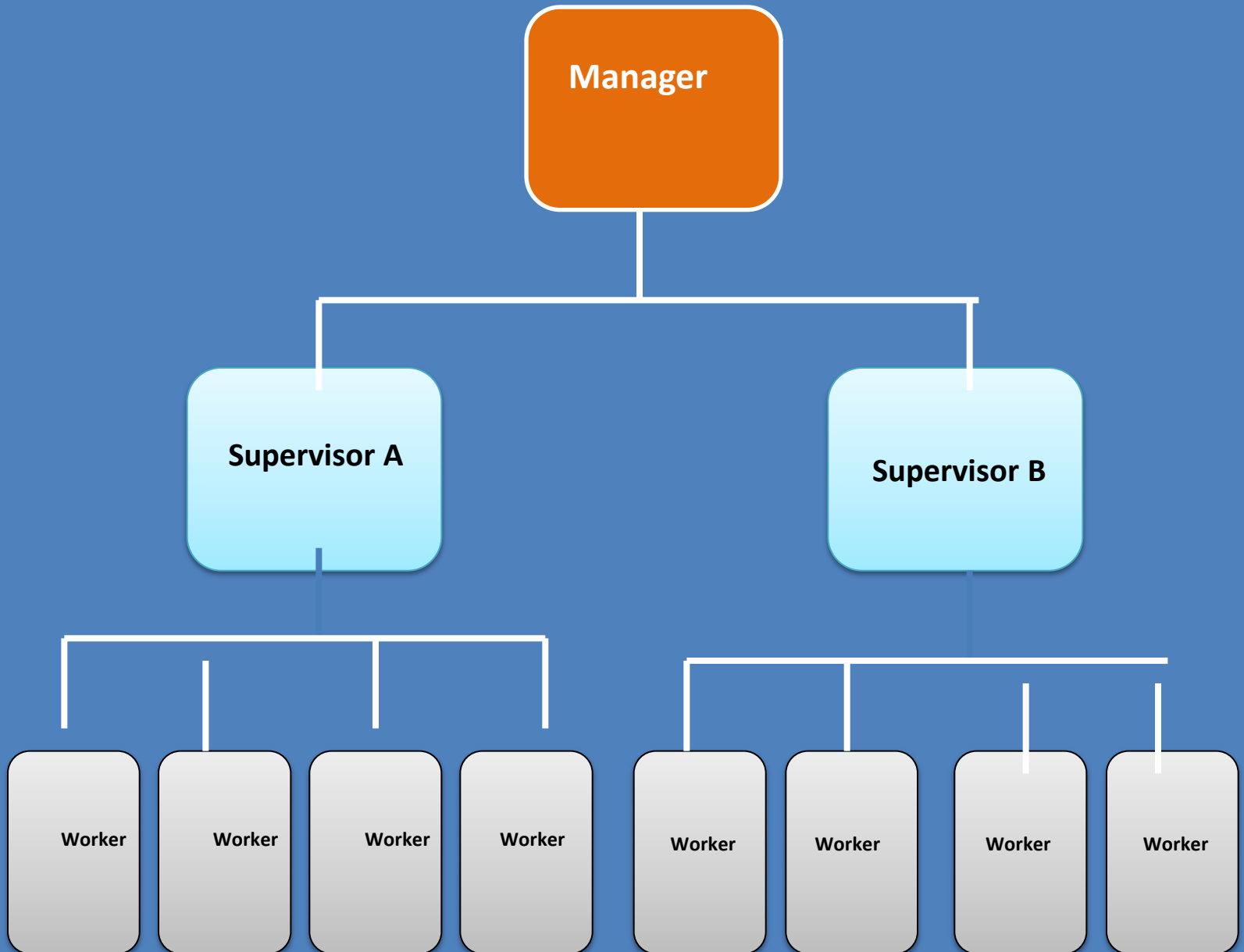
Office of the Secretary

Directorate/Bureau

Division

Section





FUNCTIONAL STRUCTURE



Staffing

- **process by which managers select, train, appoint, promote and retire individuals in the organization**
- **It is worker oriented**

Personnel Department – recruitment and selection, job analysis and placement, performance evaluation and training, promotion and retirement, and service activities directly related to the welfare of personnel like fringe benefits, leave credits, scholarships and study, allowances, etc.

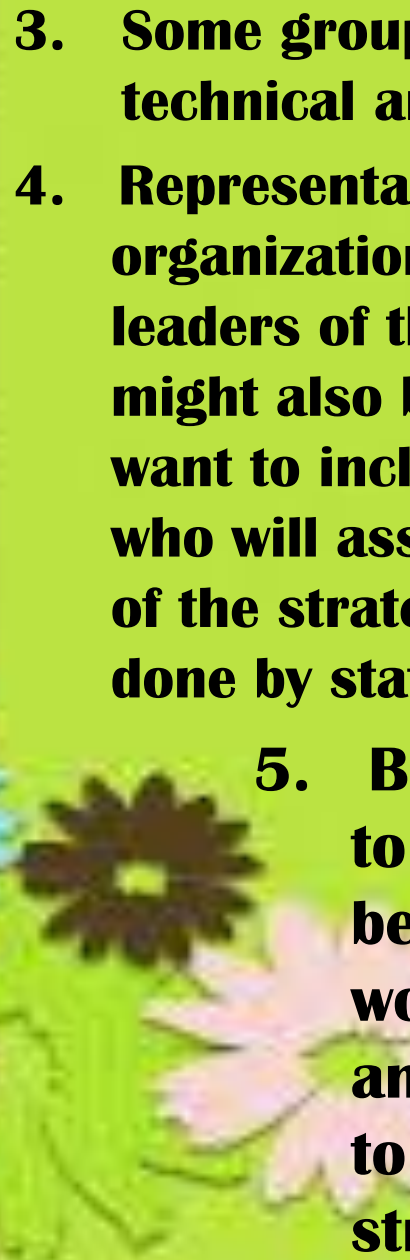
Organizing (perspective of our planning process model)

- **pertains to the creation of executive positions and the constitution of collegial groups, eventually, selecting and staffing these positions and groups with individuals who possess the required educational qualifications, training and experiences.**

****Except for a very small organization, it will probably be desirable to set up a strategic planning committee or task force”**

Planning Considerations

- 1. Choose participants carefully, assuring their commitment to the process and their willingness to devote significant time to the planning effort.**
- 2. Usually the coordinating group will include a mix of Board leaders and members, as well as senior and middle managers.**

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- A decorative graphic on the left side of the slide featuring a brown vertical line, a blue flower, a dark brown flower, and a pink flower with green leaves.
- 3. Some groups also include a representative of technical and/or support staff.**
 - 4. Representatives of stakeholders – funders, sister organizations, and allies – and perhaps former leaders of the organization or other resource people might also be included. The organization may also want to include an outside facilitator or consultant who will assist with the process and with preparation of the strategic planning document – or this may be done by staff.**
 - 5. Be sure to allocate sufficient staff time to the strategic planning process. It may be necessary to reduce the regular workloads or responsibilities of staff and Board members who are expected to play a key role in developing the strategic plan.**

Example :

1) Creation of a senior executive position if there is none in the organization, charged with the over-all planning activities in the institution and the appointment or designation of one to said position.

*** The individual should possess formal education qualifications in the discipline backed up by years of experiences and training. If the manpower warrants the executive should be given a staff of three or four people. These people are assigned major areas of work on planning, monitoring and evaluation; data gathering, organizing, processing, storage and retrieval; and computer application and retrieval .**

2) The creation and organization of a university or college planning council.

- It shall be composed of the president as chair and all university-level executives, deans of colleges and other academic unit and head of administrative support staff like administrative officer, financial officer, planning officer, budget officer, college secretary and others of equivalent rank in the non-teaching sector as members.**

3) For better manageability and decision making a small sub-committee of the bigger council to be called the Executive Planning committee should be organized by the university or college president.

4) University of college assembly should be organized and created.

- The assembly shall consist of all the members of the University or College Planning Council plus representation from the faculty and non-teaching staff, the parents associations, student council and external members from the industry, professional organizations, local governments and concerned government agencies .Representatives are non-voting members of the assembly.



Training

- **second sub-step under preparation**
- **It looks for answers to the queries
“Are we knowledgeable and
competent to plan this changes to
happen? Do we possess the proper
values and attributes to do
planning?”**



e.g. conduct a 10 day or 2 week training program on strategic planning. The more rational decision is to contract a consultant or training agency to undertake the training program. The impact of a training consultant or a training agency to participants is more profound and formal over one who is an insider.

Major Objectives of a Training Program (1978):

- 1. Increases knowledge, abilities skills and positive attitudes**
- 2. Develops and taps people's potentials to achieve the end of the organizations**
- 3. Stimulates and nurtures self-actualization**
- 4. Invigorates the development of total personalities; and**
- 5. Provides a basis for promotion and career development in the organization**

***Training program should be eagerly looked forward to by all the participants as a serious activity and not as a respite from their routine work in the organization. It should be seen as an opportunity to learn the fundamentals of strategic planning.**



"Let us do our part in our
shared individual and
institutional responsibility
for creating a better
tomorrow"



Thank
You!

