Planning And Organizing Work

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1 Introduction

1.1 Basic concepts of planning and organization

- A plan is a course of action one intends to follow in order to solve a problem
- When many people in many areas are involved, it is essential to indicate clearly who is going to do what, where, and when with regard to defined problems.
- Plan gives objectives, targets, strategies, a time frame, and a budget; one can measure its effectiveness in reducing the problem and its efficiency in terms of cost.
- Organization—“social units (or human groupings) deliberately constructed and reconstructed to seek specific goals”

Types of Organizations

1. Private for profit (market sector organizations)-includes business and corporation Organized with the primary goal of making an economic profit
2. Governmental -includes local, state, national, and international government Organizations. (Examples are public health, education, and human service organizations)
3. Private not for profit (non-governmental organizations) NGO’s/Voluntary or service sector (Lions Club)- provides civic and human services which are funded by private citizens (donations) fundraising organizations (example is united way), or privately funded foundations (example is Ford, Kellogg)

Advantages of planning

1) Planning facilitates management by objectives.
2) Planning minimizes uncertainties.
3) Planning facilitates co-ordination.
4) Planning improves employee’s moral.
5) Planning helps in achieving economies
6) Planning facilitates controlling.
7) Planning provides competitive edge.
8) Planning encourages innovations.
Advantages of organization

1. More easily control over the resources because with it resources can be rationed and allocated to different units to use them to their most productive uses at micro level.
2. Clearly defined reporting lines make it easy for employees to know to whom to report.
3. Reduce redundancies by eliminating extra and unproductive processes
4. Streamline processes by giving it more focus and adoptive nature.
5. It helps to reduce costs because the controlling of various cost control centers are controlled at micro level.
6. It gives focus and direction to an organization.

1.2 Setting objectives

1.2.1 Consistency of objectives

- The term consistency objective (CO) is used in business continuity planning in addition to point objective (PO) and time objective to.
- It applies data consistency objectives to continuous data protection services.
- Following the definitions for PO and TO, CO defines a measurement for the consistency of distributed business data within interlinked systems after a disaster incident.

1.3 Stating objectives

Goals vs. Objectives:

- Short term goals are stepping stones. They are necessary for the preparation of long term goals.
- It might be getting a license for the practice you choose, or getting an MBA in Finance, or buying and selling smaller properties until you build your reserves and step up to independence.
- Long range goals incorporate the information that you have collected through self-discovery and investigation.
- This can take some time to accomplish. Long-range goal examples might be – open a private practice, or become the CFO of a large company, or become an independent real estate investor or developer.
- Short-term objectives are actions that help you use the knowledge you’ve gained through self-discovery and investigation.
Setting Achievable Goals

Now that you are aware of the differences between goals and objectives, it’s time to make some specific decisions. Keep in mind: goals that are consistent with your lifestyle, values, and interests, will be much easier to achieve! What can you do right now, that will help you reach your goals? Make this very specific! Realistically, what do you feel you can accomplish in the next week? What about the next month? Goals will help direct you to where you want to be, in your time frame. Setting career goals is not scary when they are broken down into little chunks. These chunks should include short-term, intermediate, and long term objectives.

The following seven tips will help you set reasonable goals and assist you in achieving them.

1. Be Precise and Concrete. The more specific you can be, the easier it will be to achieve your goals. Plan everything in smaller steps and specify exactly what you will do in each of the four occupation development quadrants (Self-discovery, Investigation, Decision-making, and Implementation), and when you must take each step.

2. Specific goals might include setting the number of calls you’ll make each day, how many leads you’ll convert to customers this month, or the dollar amount you’ll reach by the end of this year.

3. Envision. Close your eyes, picture yourself taking action to meet your goal, and then see your complete reaction when you reach it. Live with your goal. How does it feel? If it feels right, it probably is right.

4. Write Your Goals Down. And carry a copy with you to look at daily. This will bring your goals into reality and will greatly increase your chances of achieving them.

5. Goals must be set into Time Frames. Set deadlines and revise the deadlines as necessary to stay on track. Goals are never set in stone. Build steps into your time frames and write these steps into your calendar and "to do" list.

6. Make Your Goals Personal. What will be my benefit upon reaching this goal? Turn every action item into something you want to do for your own satisfaction!

7. Evaluate with a Coach. Track each success and each stumbling block. Allow yourself credit and positive feedback. Realize which goals you aren’t reaching and ask yourself why and how this happened. Have your plans changed? Do your present plans still fit your goals?
1.4 Commitment and support of team members

Commitment of team members

- The depth of the commitment of team members to work together effectively to accomplish the goals of the team is a critical factor in team success.
- The relationships team members develop out of this commitment are key in team building and team success.
- You need to answer a series of questions to assess the commitment level of team members to work on a team.

- **Team Choice:** Do team members want to participate on the team? Do they perceive that they had a choice about working on a particular team?
- **Work Is Mission Critical:** Do team members believe the team mission is important? Are members committed to accomplishing the team mission and expected outcomes?
- **Team Members Feel Valued:** Do team members perceive their service as valuable to the organization and to their own careers?
- **Challenge, Excitement and Opportunity:** Are team members excited and challenged by the team opportunity?
- **Recognition:** Does your organization have a track record of providing recognition for successful teams and their projects.

Supporting team members

- It is important to provide support to team members to ensure that workgroup goals are met.
- Providing support to team members may take the form of:
  - Explaining or clarifying policies, procedures, instructions etc.
  - helping colleagues to complete tasks on time, especially if you have completed your own tasks ahead of schedule
  - assisting with solving problems
  - providing encouragement in order to foster a positive attitude,
  - providing feedback to another team member, and
  - Undertaking extra tasks if necessary.
1.5 Identifying realistic and attainable objectives

Identifying realistic

✓ Realistic - aware or expressing awareness of things as they really are a realistic description a realistic view of the possibilities
✓ Realistic - representing what is real not abstract or ideal realistic portraiture a realistic novel in naturalistic colors.

Successful planning requires being realistic about what is achievable within the restricted amount of time available. Carefully analyzing your project, and planning accordingly, will achieve positive results.

➢ Opportunity Knocks

Working with time scales limits your opportunity and creates restrictions.

➢ First Priority

Your priority, when planning a project, is to priorities all the tasks required to complete the job.

➢ Strike a Balance

Your objectives should incorporate a mix of urgent, complex tasks and routine, mundane work that is non-urgent, along with jobs that can be spread throughout the day.

Easy Steps for Realistic Planning

1. Identify your objectives. Knowing how much work your project requires will enable you to priorities your workload.
2. Be realistic about timescale's. Most tasks take a longer amount of time than most people anticipate. Filtering in sufficient time to complete tasks – with or without setbacks occurring – will help identify possible pitfalls in your planning.
3. Balance your day. Planning your project so that urgent, non-urgent and flexible tasks are combined will enable you to achieve a good balance of what is realistically achievable within a timescale.
4. Delegate. Freeing up time to tackle any problems that may arise can only be done by delegating tasks to other skilled people. Doing this will increase the timescale within your project.
2 Planning and scheduling activities

2.1 Identifying and prioritizing activities

Identifying activities

- Activities are steps in a business process and relate to the production, inspection, movement, and storage of products and services.
- One of the more difficult areas of Activity Based Costing (ABC) is the identification of activities.
- If ABC is done primarily to determine the accurate cost of products or services, activities can be identified at a high level.

However, if ABC is done as part of the process study for a Business Process Engineering (BPE) initiative, the activities need to be identified at a lower level of detail. Fortunately, the BPE methodology looks at business processes at a fine level of detail. This is done as part of the task "Document Business Process."

➢ The following steps document the business process:

1. Define the boundaries of the process,
2. identify the customers and suppliers of the process,
3. decompose the process into its component activities,
4. identify the inputs/material used by each activity,
5. identify the outputs/products produced by each activity,
6. Identify the organizational unit(s) performing each activity.

2.2 Breaking down tasks

It is often advisable to break down large tasks into smaller, manageable subtasks.

How to Break Down Tasks

Steps

1. Think about why you procrastinate. Are you afraid of failing at the task? Are you a perfectionist and only willing to begin working after every little element is in place? Are you easily distracted?
2. Break up a large, difficult project into several smaller pieces. Tackle each piece separately. This way it will seem like you have less work to do
3. Set deadlines for completion. Try assigning yourself small-scale deadlines. For example, commit to reading a certain number of pages in the next hour.
4. Work in small blocks of time. Instead of in long stretches. Try studying in one- to two-hour spurts, allowing yourself a small break after each stint.
5. Start with the easiest aspect of a large, complex project. For example, if you're writing an academic paper and find that the introduction is turning out to be hard to write, start writing the paper's body instead.

6. Enlist others to help. Make a bet with your family, friends or co-workers that you will finish a particular project by a specified time, or find other ways to make yourself accountable.

7. Eliminate distractions.

**Task breakdown structure**

A work breakdown structure (WBS), in project management and systems engineering, is a deliverable oriented decomposition of a project into smaller components. It defines and groups a project's discrete work elements in a way that helps organize and define the total work scope of the project.

A work breakdown structure element may be a product, data, a service, or any combination. A WBS also provides the necessary framework for detailed cost estimating and control along with providing guidance for schedule development and control.
**Job/task breakdown form**

<table>
<thead>
<tr>
<th>Stage</th>
<th>Key Points</th>
<th>Hazards and Risks</th>
</tr>
</thead>
<tbody>
<tr>
<td>A brief description of what is to be done</td>
<td>How to do it – identify equipment to be used, describe method, stress all safety points, safety equipment</td>
<td>Identified at each stage</td>
</tr>
</tbody>
</table>

| Position vehicle on hoist | 1. Ensure hoist area is clear of people and equipment.  
2. Shut all doors, bonnet, boot and lower radio aerial.  
3. Centre vehicle on hoist, ensuring that the weight is evenly distributed to the front and rear.  
4. Identify the correct jacking points.  
5. Place the lifting pads under the vehicle at the front and rear on the jacking points, ensuring contact | Equipment Failure  
- Check the capacity of the hoist compared to the weight of the vehicle. If vehicle is too heavy, do not proceed.  
Manual Handling Risks  
- Squat or half kneel – do not twist spine.  
Maintain low Back curve when reaching.  
- Avoid reaching – get as close to vehicle as possible. |

| Raise hoist | 6. Check vehicle stability by looking at the jacking points.  
8. Raise hoist so that top wheel nuts are located between hip and waist height. | Crushing Risks  
- Only one person shall operate the hoist at a time.  
- Always operate controls manually.  
- Make sure area is clear before raising hoist.  
Manual Handling Risks  
- Squat or half kneel – do not twist spine. |
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</table>
| Remove and replace wheels | 8. Perform vehicle service:  
- Use air tools whenever possible.  
- Use a stride stance & keep knees slightly bent.  
- Grasp wheel with both hands (bear hug).  
- Slide wheel towards you, lower to ground using legs as Leverage and thighs as support. Repeat in reverse to Replace wheel.  
- Ensure wheels nuts are tight (use a tension wrench or Breaker bar). | Manual Handling Risks  
- Squat or half kneel – do not twist spine.  
- Assistance may be required when lifting excessively heavy Wheels – e.g. 4WD, light truck etc.  
Striking Hazard  
- Do not bounce wheels. | |
| Lower hoist | 9. Remove lifting pads. | Crushing Hazard  
- Only one person shall operate the hoist at a time.  
- Always operate controls manually.  
- Clear hoist area & all around hoist posts before hoist is Lowered.  
Manual Handling Hazard  
- Squat or half kneel – do not twist spine. Maintain low Back curve when reaching.  
- Get as close to vehicle as possible.  
Slips and Falls Hazard  
✓ Clean up any spills or rubbish. | |
| Report faults | 10. Tag out hoist if faulty so it cannot be used until fixed. | Report fault to supervisor immediately. | |
### 2.3 Determining manpower requirements

**What is Manpower?**

- Manpower is a large employment services company that places workers with other companies.

Among other things, it serves accounting firms by helping in the areas of taxes, efficiency and risk management.

- Manpower owns four other brands: Manpower Professional, Jefferson Wells, Elan and Right Management.

**What is manpower requirements determination (MRD)?**

- MRD is a scientific methodology focused on measuring workload consumption data to determine the number of people needed to conduct mission requirements successfully.

- The Manpower Requirements Determination (MRD) system is a verifiable, repeatable, and defendable program that collects, measures, and analyzes the human capital needed to perform Coast Guard missions. Currently, Resource Managers use different methods of measuring human capital (including Snapshot, staffing standards, station staffing standards, etc.) which are often based on local or programmatic needs and do not allow for a standardized comparison of human capital requirements across units or programs.

- The MRD process can be applied on behalf of individual programs, operational Commands and all Coast Guard planning elements.

- The MRD process will give them the tools they need to accurately determine either existing human capital needs or human resource demands for emerging or changing mission requirements.

- MRD analysis is designed to make use of data from every component of the organization and will provide useful information to a wide variety of decision making processes. As a result, decision Makers throughout the Coast Guard will be able to evaluate personnel requirements based on a common set of standards and analytical approaches.

- The goal of MRD is not to replace or alter existing resource management processes (e.g. the Resource Group (RG), Senior Leadership Group (SLG), and Resource Proposals (RP)) but to provide senior managers the information they need to make better informed resource management decisions.

- MRD will provide critical data on the quantity and type of personnel resources required to carry out a mission operate an asset, etc. It will not make the final
decision on how or where resources are ultimately employed. That decision will continue to reside with senior leadership.

✓ The purpose of the MRD initiative is to design and implement an improved Coast Guard business process for describing and specifying the demand for human capital.

✓ The specific outcome will be a valid, reliable, “to be” business model describing the high-level process for specifying human capital needs to the Coast Guard. The model will establish what entities perform key roles in that process, the responsibilities of process owners and users, measures of process performance, and the basis of accountability. To this end, MRD Team has developed the Coast Guard Staffing Logic and Manpower Requirements Manual (CGSLMR).

**Capital Requirements**

As noted in Commandant’s Intent Action Order 8 – Human Resource Strategies to Support Coast Guard Maritime Strategy “The Coast Guard’s staffing standards are Obsolete and no process exists to remedy this state. Leaders and resource managers do not have confidence that any particular set of human capital requirements are based on industrial engineering principles, or any objective science, and cannot compare sets of requirements to optimize human resource allocation” The MRD system will provide the tools needed to resolve this discrepancy. The process to get to human capital requirements (staffing) must be understood before the Coast Guard can move towards a formal MRD system. In a macro sense, mission, strategy, and vision (intent) are communicated by senior leadership to the organization, particularly to Program Managers. Between senior leadership and programs, desired outcomes are described, usually in terms of policy or mission results. Those result simply a certain kind of action (activity) which can best be understood as a concept of operations (CONOP) – how do we accomplish these outcomes? Programs also determine the standards to which activities will be performed (quality, quantity, cost, time).
Key Players in the Manpower Requirements Determination Process

The primary players in the MRD system are the Program Manager, who sets mission standards, and the Unit Commander who will carry out the mission. Working together, this duo must take the Commandant’s mission direction and translate it to mission accomplishment. The MRD system provides the Program Manager, members of the chain of command, and the Unit Commanders with critical resource information needed to make decisions on how best to use often limited resources to meet mission requirements.

The Outputs of MRD Analyses
For a given unit of work associated with a mission, the basic outputs are the number of people needed and the competencies, experience, and other characteristics (rank, rate, training, etc.) required to achieve a mission standard. The analysis also includes the softer competencies involved in leadership and management.

For example, MRD supports:

- **Recruiting:** by helping define how many people are needed to accomplish the Coast Guard’s missions.
- **Technical training:** by identifying the quantities of needed competencies, which informs the training system about the numbers of people who must be trained to have those competencies.
- **Development and advancement systems:** by providing a better understanding of the logical, work related, grade structure of the workforce.
The MRD Division

Specific responsibilities of the MRD Division will include:

- Determine and document manpower requirements for all unit types.
- Determine and document manpower requirements for all programs.
- Maintain staffing standards.
- Develop, analyze and coordinate new methods and enhancements to the MRD process.
- Provide research and analysis of MRD policies, procedures, tools and ideas that facilitate the determination of an accurate and consistent statement of the Manpower required for the Coast Guard.
- Review, assess, and validate the implications of Coast Guard wide programs, policies and initiatives that may have manpower requirements.
- Review and test prospective manpower analysis tools.
- Conduct special studies, merge studies/analysis and prepare reports in support of tasks, ratings or project assignments.
- Provide advice, guidance, and technical consulting to Program Managers and Unit Commanders.
- Ensure all MRD Automated Information Systems (AIS) functional integrity requirements are maintained.
- Maintain manpower policy documents.
- Maintain a library of all unit type analysis.
- Perform such manpower analysis as may be required by higher authority.

2.4 Allocation of resources

What is Resource Allocation?

✓ Resource allocation is the distribution of resources – usually financial - among competing groups of people or programs.
✓ When we talk about allocation of funds for healthcare, we need to consider three distinct levels of decision-making.
✓ Analysis of how scarce resources (‘factors of production’) are distributed among producers, and how scarce goods and services are apportioned among consumers.
✓ This analysis takes into consideration the accounting cost, economic cost, opportunity cost, and other costs of resources and goods and services. Allocation of resources is a central theme in economics (which is essentially a study of how resources are allocated) and is associated with economic efficiency and maximization of utility.
How to allocate resources

Steps

1. **Consider resource availability when estimating task durations:** - This step is crucial but often overlooked. Resources must be considered during the construction of the schedule, not just afterwards.

2. **Create and organize all your resources:** - The best way to keep your resources organized is through the resource sheet.

3. **Assign each work task to a resource:** - After creating the schedule in the Gantt chart view, you will need to specify which resource(s) is associated with each task.

4. **Check the resource allocation in the resource graph view:** - After creating your schedule and assigning resources, you can check for over-allocation.

2.5 Coordinating schedule work activities

If you want to be a successful manager, you should learn how to coordinate activities in your task list as well as how to manage tasks of your subordinates. You should avoid doing futile jobs but teach your employees the basics of work coordinating. And activities coordinator will help you do it. It is a special kind of task management software that keeps tasks, to-do lists and jobs in a single database. Such software helps create, plan, manage and track activities.

There's a set of tools that bring the best activities coordination to you and your employees, including the following:

- Setting activity priorities and statuses
- Tracking activities by status, priority, resource assignment, due date and progress
- Sharing activities among a group of employees
- Managing activities in real mode
- Exchanging data between employees by e-mail
- Printing out activity lists and task lists
- Storing all information on activities in a single database
- Protected access to the activities coordination database

2.6 Construct the detail of operation

A construct is the basic contrast between two groups. When it is imposed it serves both to distinguish between elements and to group them. Thus the construct refers to the nature of the distinction one attempts to make between events, not to the array in which his events appear to stand when he gets through applying the distinction between each of them and all the others.
3 Work Plan

3.1 Identifying work methods

What is a work method?

A work method is used to describe manual and repetitive production jobs, such as factory or assembly-line jobs. These methods are used by industrial engineers to determine standard rates of production which are used to set pay rates.

How to Identify the Work Measurement

The main purpose of work measurement is to determine the time an experienced and trained employee should take to perform a task in a specific environment and using well-determined methods. This time is referred to as standard time. Work measurement enables organizations to schedule work effectively and efficiently.

Instructions

1. Carry out a time study by recording the time it takes to complete a work cycle.
2. Observe your workers at numerous randomly selected moments and at separate points along the time line of a job to observe how much time the workers are active or idle.
3. Analyze data from element times obtained from different time studies carried out in the past.
4. Give your employees responsibility for separating their jobs into specific tasks and making observations of the tasks they are performing and recording the overall job times.
5. Estimate the time required to carry out specific elements of a job.
4: Monitor work activities

4.1 Selecting monitoring and evaluation

Select appropriate work activities

When examining and assisting clients to select work activities the following areas should be explored with the client, and their significant others as appropriate, to enable realistic and appropriate choices to be made.

✓ What is the meaning and perceived worth of work and chosen work activity to the person?

✓ What work activities was the person undertaking, and are these still realistic and achievable?

✓ What effects might changes have on the person’s abilities or capabilities to perform previous or other work activities in both the short and long term?

✓ Does the individual want and/or need to continue to work?

✓ Has their occupation any direct bearing on their current health status?

✓ What is the physical condition of the individual? Are their wants/needs realistic and achievable options given the individual’s short- and long-term capabilities?

✓ Can adjustments be made to their work environment to enable them to fulfil their desire?

✓ Can any other adaptations or aids help in the achievement of work-related activities and are these available?

✓ What knowledge and skills does the person have?

✓ Do they have any previously untapped skills?

✓ Will further education and training be required and, if so, is help and support available (practical and/or financial) to access this?

✓ Are they aware of their employment rights?

✓ Are there any other financial aspects to be considered?

Monitoring Work activities

What is workplace monitoring

Employers have the right to monitor your activities in many situations at work. Monitoring in the workplace includes:-

- recording on CCTV cameras
- opening mail or e-mail
- use of automated software to check e-mail
• checking phone logs or recording of phone calls
• checking logs of websites visited
• videoing outside the workplace
• getting information from credit reference agencies
• Collecting information through 'point of sale' terminals, such as supermarket checkouts, to check the performance of individual operators.

All of these forms of monitoring are covered by data protection law. Data protection law doesn’t prevent monitoring in the workplace. However, it does set down rules about the circumstances and the way in which monitoring should be carried out.

Before deciding whether to introduce monitoring, your employer should:

• be clear about the reasons for monitoring staff and the benefits that this will bring
• Identify any negative effects the monitoring may have on staff. This is called an impact assessment
• consider whether there are any, less intrusive, alternatives to monitoring
• Work out whether the monitoring is justified, taking into account all of the above.

Except in extremely limited circumstances, employers must take reasonable steps to let staff know that monitoring is happening, what is being monitored and why it is necessary.

Employers who can justify monitoring once they have carried out a proper impact assessment will usually not need the consent of individual members of staff.

**How to Evaluate a Job**

**Does it meet Your Criteria?**

When you accept a job offer and start in a new role, it’s too late, then, to turn back! The best approach is to decide whether you want the job before an offer is extended. In other words, you need to set some criteria for your new role. This allows you to clarify whether a particular job suits your needs. Unless you’re motivated solely by money, it’s doubtful a few extra dollars will turn a bad job into a good one. The time to start any serious evaluation of a potential new job is after you have been to the first job interview. The full details of the job often do not become clear until then.
After the interview, you need to decide whether the new position is right for you. Ask yourself the following:

- Does the new job meet the criteria you set out when you first began your search?
- Will the new job improve your level of personal and professional satisfaction?
- Or will it simply offer you a rehash of what you already have?

One tool to help you in comparing one job with another is the "Position Comparison Guide" (separate document).

If, however, you now know that the job is, indeed, one you would enjoy, the next step is to look at the specifics of the offer.

**The Economic Factor**

Compensation, of course, will be a key factor in your decision whether to accept a new position.

If you're looking at an opportunity that’s in a different geographic location, for instance, you might want to do some investigating before you even interview. For example, if you live in a nice suburban community in Adelaide, what would it cost you to maintain your current lifestyle in an area like Sydney? Your answer (and your willingness to make the necessary trade-offs) will help determine your level of interest when considering the new position.

**Figuring the Bottom Line**

If the job interests you, then determine the conditions under which you’ll accept. These fall into two categories: the “**Bottom-Line**” and “**Porcupine**”.

The term “bottom-line” refers to the amount of compensation you feel is absolutely necessary in order to accept the job offer. If, for example, you really want $56,000 but would think about $55,000 or settle for $54,000, then you haven’t established your bottom line. The bottom-line is the figure, below which, you would positively walk away from. Setting a bottom line clarifies your sense of worth and helps avoid an unpredictable bargaining session.
Lay Your Cards on the Table

It’s much better to lay your cards on the table in the beginning than to barter to get what you want. An employer can get very irritable when a candidate says, “I’ll think it over,” or if they keep coming back with new demands again and again. Even if you get what you want, you’ve created a negative impression with the company that will carry over after you’ve been hired. In effect, you may win the battle, but lose the war.

The Porcupine Category

Of course, there are considerations aside from money that usually need to be satisfied before an offer can be accepted. Factors such as your new position title, review periods, work schedule and promotion opportunities are important. These, too, should be looked at carefully.

The “porcupine approach” is used to quantify each consideration or “point” that you feel is important as a condition for acceptance. Professional recruiters will use this approach to understand each point. They can then work with the company to put the deal together, without having to go back to you later to get “one more thing.”

Once you know you’re bottom-line and each condition, or point on the porcupine, you’re in a better position to get what you want, since you’ve established quantifiable goals to shoot for.

How an Offer Is Staged

Every company makes hiring decisions differently. Some will encourage shoot-from-the-hip managers to make job offers on the spot. Other companies will limit the decision maker’s ability to act quickly and unilaterally, and require a drawn-out series of staff meetings, subsequent interviews, corporate signatures, and so on.

✓ Offers can be extended by either a letter, or verbally from a hiring manager. They can also be made through a third party, such as a recruiter. In either case, be careful.

✓ An offer needs to include the following components before it can be considered official:

1. Your position title.
2. You’re starting date.
3. Full details of salary or wages, including overtime, call-out fees, etc.
4. Full details of car expenses/fuel cards etc.
5. Specific agreements regarding compensation increases based on future reviews.

Before you resign from your present job, make sure you nail down each of these components in writing, in the form of an offer letter.

As an example, it has happened that a candidate accepted an offer, assuming he was on a wage, including overtime and call-out fees. When he started the job, he found he was on a salary, not a wage, so no overtime or additional fees were involved.

There was also the case of a Technician who was told there was a company car and fuel card. He asked if he could have a Car Allowance instead, and they agreed. The only trouble was that when he started, he found that a Car Allowance did not come with a fuel card!

All of these details need to be explicit in the letter of offer. If it’s not written, you have no recourse.

**Accepting the Offer**

It often happens that you may be applying for several positions at the same time. Be careful here not to fall into the trap of playing one off against the other. As you go through the initial interviews, gaining a fuller understanding of each offer, line them up and give each of them a rating. Remember to rule out the ones that do not meet your base criteria. Rate the rest according to which job you would most like to win.

**New Angles and Unusual Deals**

Money can present a problem for employers when your salary requirements exceed the published range for the position, or create an inequity within their department. In fact, internal equity issues (in which your expected salary might be greater than someone on the staff who has more professional or company seniority) are the cause of most deals that fail to close for financial reasons.

To satisfy money matters, look for ways to increase your overall yearly compensation, rather than your base salary. Here are a couple of goodies you can shoot for to boost your earnings without ruffling too many feathers:
• A performance bonus to be paid after thirty, sixty, or ninety days, assuming your clearly defined goals are met.
• An accelerated review which would occur after three or six months, rather than on your first anniversary of employment, in which your salary would be increased.

When required, companies will sometimes serve up these tasty morsels to hungry candidates who recognize that overall compensation consists of more than salary alone.

Careful evaluation mixed with a little bit of creativity will help you get the deal you want.

4.2 Determining feedback mechanism
Feedback mechanisms provide organizations with data and perceptions from primary stakeholders about the quality and effectiveness of their efforts. An ideal feedback process involves the gathering of feedback and the communication of a response, which forms a ‘feedback loop.’
However, the language and terminology used to describe feedback systems in international assistance organizations varies, and few organizational reports and websites explicitly refer to feedback mechanisms or feedback loops.
Likewise, in e-mail correspondence and phone conversations, many staff of aid organizations did not necessarily use this term. Instead, most reported on and described various processes and mechanisms that they utilize to solicit opinions and feedback from recipients of aid about their work, including: participatory methods and processes for assessments, program design, monitoring and evaluation; real-time evaluations; accountability frameworks and mechanisms; complaints and response mechanisms; listening exercises; perceptions studies; social audits; social performance management systems; community score cards; citizen report cards; constituency feedback, story-telling, and others.
5. Review and evaluate work plans and activities

5.1 Reviewing and agreeing Work plan

Agreeing the work plan

The result of all this activity will hopefully be to produce some options for taking the work of the group forward. Unless you are very fortunate with resources, you are unlikely to be able to do everything straight away, and you will need to engage with a process which one of the Collaborate pilot groups termed “finding the focus within the focus”.

There are no easy rules for doing this, and several of the Collaborate pilot groups found that they needed more than one meeting – and in some cases had to reopen possibilities that they had previously placed lower down the order of priorities. It is worth bearing in mind that all good design processes allow for iterations before the final choice is made – time spent getting it right at this stage can help you avoid wasted effort and failure further down the line.

Ultimately, the choice will be determined by a balance between priority, opportunity and achievability – you are looking for the option which stands the best chance of delivering real benefit to all of the members of the group.

Main themes and parallel activities

It may help to simplify the choice to remember that there are some things that can go on alongside the main activity and which require relatively little resource. Examples are setting up a library of policies and procedures on Dropbox, and developing a comprehensive list of training providers and resources (although setting up a training consortium does require a substantial input of time from someone). Once these are set up, time could be set aside at the next couple of Core Group meetings to review each one in turn – to look at the picture which has emerged, and discuss ways in which the group might build on this to develop shared resources.

Getting your Board on board

Before you finalize the plan, each member of the cluster should consider whether they need the approval of their Board before going ahead. If so, you’ll then need to decide whether a formal agreement such as a Memorandum of Understanding is needed.
There is little more frustrating than starting out on a project only to find that it has stalled because one of the partners needs Board approval.

Whether you need Board approval will largely depend on the level of risk involved. In most cases, this is not high enough to need Board consent, and things are conducted on a basis of trust. However, while Board consent may not be needed, engaging and enthusing Board members with the project is important, and can pay big dividends later.

**Finalizing the plan**

Once a way forward has been agreed, write it down in a formal plan so that everyone knows what is intended. This will help you to track progress, identify any unexpected gains, and provide a benchmark for evaluating how the programmed is working once it has been running for a while. Contents of this plan might include:

- reasons why you are doing it
- objectives
- how work and resources will be allocated
- a timeline, including interim milestones (to help you track progress) and a point at which it will be reviewed and evaluated
- a plan for engaging support and building profile with external audiences
- arrangements for managing the project

### 5.1 Evaluating recommended changes to the plan

An evaluation plan is a written document that states the objectives of the evaluation, the questions that will be answered, and the information that will be collected to answer these questions, and when collection of information will begin and end. You can think of the evaluation plan as the instructions for the evaluation. This plan can be used to guide you through each step of the evaluation process because it details the practices and procedures for successfully conducting your evaluation.

Once the evaluation plan has been completed, it is a good idea to have it reviewed by selected individuals for their comments and suggestions. Potential reviewers include:

- Public Housing Agency (PHA) administrators who can determine whether the evaluation plan is consistent with the agency’s resources and evaluation objectives.
- Housing staff who can provide feedback on whether the evaluation will create an excessive burden for them and whether it is appropriate for residents.
- Professional evaluators.
This chapter describes the components for an evaluation plan and provides an outline for preparing a plan. Although you may never need to develop one without assistance, it is helpful for you to know what a plan is and how it is being used by the evaluator you select. The information contained in this chapter will help you:

- Work with an experienced evaluator (either an outside evaluator or someone within your PHA) to develop a plan.
- Obtain a basic understanding of what should be included in an evaluation plan to assist you as you review one.

5.2 Finalizing plan

**Finalizing Your Business Plan & Putting It into Action**

GOAL: Compile the sections of your business plan into one document and add your appendices, write your executive summary, secure final approval of your business plan, and prepare for your road show.

**How a Business Plan for Enduring Social Impact Links Analysis to Strategy to Action**

![Diagram of business plan process]

**Steps to finalize your business plan**

As you complete and compile your business plan in step four, keep in mind that the narrative of the plan should follow this same trajectory—from analysis to strategy to action. Step four involves five tasks, starting with the development of your action plan:

1. **Develop an Action Plan for Phase One**

   - In step three, you established phase one goals for each section of your implementation strategy, and began identifying the activities necessary to complete those goals.
An action plan for phase one allows you to describe in even greater detail the actions needed to meet those goals. This action plan will serve as your master to-do list to implement the plan.

2. Compile the Sections of Your Business Plan into One Document and Add Appendices

Business plans are meant to tell a story of your organization’s planned social impact that will get current and future stakeholders, including social impact investors, excited and make them want to be involved.

3. Write an Executive Summary

After completing a full draft of the business plan with which the working group is comfortable, you can write your executive summary. The executive summary should be a two-to-four page summary of the entire plan, focusing particularly on why now and why you; the amount of funding sought; and the impact you expect to have as a result of implementing your plan. This document will serve as a short description of your business plan to send to anyone interested in learning about the organization’s future plans.

4. Seek Review and Approval

The preliminary work you did to develop an update schedule, along with a work plan and approval process, should facilitate this necessary part of finalizing your business plan. Following the approval schedules that you developed in step one, distribute the complete plan to the appropriate reviewers and remind them of the deadlines for approval.

5. Prepare to Launch Your Road Show

While the business plan is in the final review process, it is time to capitalize on your preparations for the road show. Schedule any meetings with potential social impact investors that are not already on your calendar, so that the process of raising money for your plan can begin the moment your business plan receives final approval.

Concluding Step 4

As you complete step four, you should have a complete and approved business plan in hand, and you should already be preparing for what comes next: capitalizing your plan and putting it to work.