

**June 2014**

**Guidance Pack 2013–15**

**Part 2: Toolkit**

# Stage 1: Corporate Planning

# Process: Preparation

## 1d. Sensitisation Exercise: Walk-through

## Corporate Planning End-to-end

# 1d Sensitisation Exercise: Walk-through Corporate Planning end-to-end

**Overleaf is a summary template for use in sensitisation and building understanding of the whole corporate planning process.**

As well as understanding the concept of corporate planning it can be useful to walk through the component parts. The end-to-end process overview is designed to help with that. The decision making group and the technical team appointed to deliver the corporate plan should work quickly through the template and identify those elements of the process which appear to be quite straightforward and those that might be problematic. In that way they can foresee and plan how to deal with some of the challenges they might face.

A note should be made of any useful documents that are identified and of actions that should be taken to facilitate the corporate planning process, as well as who will be responsible for those actions.

Making a presentation on corporate planning, working through the template and discussing elements should be achievable in a half day workshop.

## Corporate Planning End-to-end Process Overview

### Corporate Planning: Summary Template for Sensitisation and Building Understanding of the Whole Process

**Ministry:**

| **Element** | **Present or not** | **How adequate** | **Work needed to bring to desired level, by whom** | **Problems/challenges anticipated** |
| --- | --- | --- | --- | --- |
| Mandate |  |  |  |  |
| Mission and vision  |  |  |  |  |
| Long term strategic objectives; contribution to governor’s ‘X’ point agenda, MDGs[[1]](#footnote-1), etc. |  |  |  |  |
| Contribution to state development plan(s) |  |  |  |  |
| Medium term rolling plan or medium term sector strategy |  |  |  |  |
| Medium term MDA[[2]](#footnote-2) objectives |  |  |  |  |
| List of functions which relate to medium term objectives |  |  |  |  |
| Functions reviewed against current structure |  |  |  |  |
| Ministry structure and organogram which relates to medium term objectives, functions and processes |  |  |  |  |
| Activity/performance based budget which relates to departmental functions |  |  |  |  |
| Performance criteria for existing functions, internal M&E[[3]](#footnote-3), etc**.** |  |  |  |  |
| Map of the processes which deliver an outcome to clients or customers |  |  |  |  |
| Comprehensive establishment plan which lists all posts by departments with a summary of grades and responsibilities. |  |  |  |  |
| A staff list and/or nominal roll by department providing details of all staff currently employed with their age, qualifications, experience, and grade. |  |  |  |  |
| Job descriptions/ schedules for each post which describe the responsibilities of the job, to whom it reports, the qualifications, experience and competences required and the grade and salary. |  |  |  |  |
| A comparison of establishment plan versus the staff list highlighting vacancies, skill and experience deficiencies, etc. |  |  |  |  |
| An overall workforce plan including a training and development plan, a succession plan and an approach to repositioning and recruitment. |  |  |  |  |
| Service charter/service standards |  |  |  |  |

1. Millennium Development Goals [↑](#footnote-ref-1)
2. Ministry, department or agency [↑](#footnote-ref-2)
3. Monitoring and evaluation [↑](#footnote-ref-3)