

**June 2014**

**Guidance Pack 2013–15**

**Part 2: Toolkit**

# Stage 1: Corporate Planning

# Process: Preparation

**1e. Model Corporate Planning Timetable**

**June 2014**

**SPARC Corporate Planning**

**Guidance Pack 2013-15**

**Part 2: Toolkit**

# Stage 1: Corporate Planning

# Process: Preparation

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

# 1e Model Corporate Planning Timetable

This is an example of the timetable which should be developed and agreed for the whole corporate planning process. The plan details will vary in terms of actions, sequence and deadlines, but should be agreed with the state decision making body before the main corporate planning process begins.

| Corporate Planning Example Activity Plan | month 1 | month 2 | month 3 | month 4 | month 5 | month 6 |
| --- | --- | --- | --- | --- | --- | --- |
| Stage 1 Preparation |  |  |  |  |  |  |
| Assemble documents: MTSS, mandates, laws, organograms, etc. | week 1&2 |  |  |  |  |  |
| Identify and mobilise internal technical team |  |  |  |  |  |  |
| Communication strategy and plan |  |  |  |  |  |  |
| Agree and establish corporate planning Steering Group; TOR[[1]](#footnote-1) |  |  |  |  |  |  |
| Establish MDA Core Group and TOR to lead the corporate planning |  |  |  |  |  |  |
| Formally agree plan and timetable |  |  |  |  |  |  |
| Sensitisation – senior staff |  |  |  |  |  |  |
| Sensitisation and communication – staff etc. |  |  |  |  |  |  |
| Apply readiness for change checklist |  |  |  |  |  |  |
| *Stage 1 Interim report – plan, deliverables, deadlines, responsibilities* | √ |  |  |  |  |  |
| Stage 2: Mandates, Vision, Mission, Objectives |  |  |  |  |  |  |
| Establish vision, mission and value statements; use existing sources | week 3&4 |  |  |  |  |  |
| Agree and communicate vision, mission and value statements |  |  |  |  |  |  |
| Establish long and medium term objectives |  |  |  |  |  |  |
| Directorate and unit long term objectives and KPIs[[2]](#footnote-2) agreed and documented |  |  |  |  |  |  |
| *Stage 2 Interim report – mandates, vision, mission and MTOs[[3]](#footnote-3)* | √ |  |  |  |  |  |
| Stage 3: Functions, structures and processes |  |  |  |  |  |  |
| Establish technical and expert team |  |  |  |  |  |  |
| Review functions and clarify core services |  |  |  |  |  |  |
| Align structure to functions |  |  |  |  |  |  |
| Revise organograms |  |  |  |  |  |  |
| Map processes related to functions |  |  |  |  |  |  |
| Review processes: improve those needed; identify redundant and missing |  |  |  |  |  |  |
| Present and agree revised processes |  |  |  |  |  |  |
| Communication and implementation plan |  |  |  |  |  |  |
| *Stage 3 Interim report – MDA functions, structure and processes* |  |  | √ |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Stage 4: Establishment and Workforce Planning |  |  |  |  |  |  |
| Identify technical team |  |  |  |  |  |  |
| Review current establishment plan, posts and staff details |  |  |  |  |  |  |
| Create new establishment plan |  |  |  |  |  |  |
| Establishment plan submitted |  |  |  |  |  |  |
| Develop workforce plan (use toolkit methodology) |  |  |  |  |  |  |
| Workforce capability forecast related to vision and objectives |  |  |  |  |  |  |
| Quantify workforce flows in/out and through MDA |  |  |  |  |  |  |
| Conduct personnel audit |  |  |  |  |  |  |
| Comparative analysis – staff information with establishment plan jobs |  |  |  |  |  |  |
| Identify gaps and succession priorities |  |  |  |  |  |  |
| Draft job, and job family, descriptions |  |  |  |  |  |  |
| Draft and submit plan to reposition redundant staff/skills |  |  |  |  |  |  |
| Submit workforce plan |  |  |  |  |  |  |
| Identify capability gap |  |  |  |  |  |  |
| Revise staff training and development plan |  |  |  |  |  |  |
| Establishment and workforce plans and implementation plan |  |  |  |  |  |  |
| *Stage 4 Interim report – establishment and workforce plan* |  |  |  |  |  | √ |
| Stage 5: Implementation Plan and Handover |  |  |  |  |  |  |
| Corporate planning process recommendations compiled |  |  |  |  |  |  |
| Transition plan |  |  |  |  |  |  |
| Implementation plan |  |  |  |  |  |  |
| Communication strategy and plan |  |  |  |  |  |  |
| Progress reviews plan |  |  |  |  |  |  |
| Governance and/or decision group formal sign off |  |  |  |  |  |  |
| *Final report – recommendations, implementation plan, lessons learned* |  |  |  |  |  | √ |
| Lessons Learned and Implemented (KM[[4]](#footnote-4)) |  |  |  |  |  |  |
| Lessons learned and transfer to other MDAs/states |  |  |  |  |  |  |
| Corporate planning guidance and process updated |  |  |  |  |  |  |
| Lessons for work streams and SLPs[[5]](#footnote-5) |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| Developing Service Charter (can be done in parallel if required) |  |  |  |  |  |  |
| Establish technical team |  |  |  |  |  |  |
| Service charter policy and guidance adopted |  |  |  |  |  |  |
| Service charter policy roles and function adopted/adapted |  |  |  |  |  |  |
| Service charter drafted/reviewed and agreed |  |  |  |  |  |  |
| Service delivery unit set up and staff trained |  |  |  |  |  |  |
| Service charter disseminated to staff and stakeholders |  |  |  |  |  |  |
| Service improvement plan in place |  |  |  |  |  |  |

1. Terms of reference [↑](#footnote-ref-1)
2. Key performance indicators [↑](#footnote-ref-2)
3. Medium term objectives [↑](#footnote-ref-3)
4. Knowledge management [↑](#footnote-ref-4)
5. State level programmes [↑](#footnote-ref-5)