

## Blueprint: Annual Implementation Plan



An **Annual Implementation Plan** is the process of linking strategic goals and objectives to tactical goals and objectives. It describes milestones, conditions of success and explain how or what portion of a strategic plan will be put into operation during a given operational period.

### Need

- Organization has a strategic plan for the next few years and needs to break it down into a detailed quarterly plan for the next year.
- Organization needs to plan for the next year and set clear goals to be achieved.

### Objectives

- To have a plan with clear pathways to goals in different areas.
- To bring clarity about the organization's future plan to every staff member.

### Challenges

- Buy-in from staff is crucial and the whole team should be included in the planning as much as possible.
- It is important to establish ambitious but realistic expectations.

### Contents of an AIP

Contents of an annual implementation plan are:

- AIP model including: Priority areas, Goals, Activity, Outcome, Deadline, Resources, Team and Status
- Timeline
- Review Checklist
- Cash Flow

### Tools

[AIP Template](#)

### Keys to Success

- Involve both the leadership team as many staff members as possible in every step to build ownership of the plan.
- Make **SMART goals** (Specific, Measurable, Attainable, Realistic, Time-bound)
- The AIP priority areas reflect the areas that almost every organisation focuses on over its lifespan. But depending on the **Life Stage** of the organisation, it might not always make sense to plan for each one just yet. The AIP can be used flexibly according to your needs.

## Annual Implementation Plan Step by Step

Introduction and Review	Vision Statement	Define Goals & Activities	Allocation of Resources
<ul style="list-style-type: none"> <li>Review the organisation's current strategies as per the <a href="#">Strategic Plan</a>.</li> <li>Consider:               <ul style="list-style-type: none"> <li><b>Problems and opportunities</b></li> <li>What has been done <b>last year</b> that should continue this year</li> <li><b>New objectives</b> for the year</li> <li><b>New opportunities</b> coming up given by the changing scenario</li> </ul> </li> <li>Leadership and team members should work together on the AIP to promote ownership and collaboration.</li> </ul>	<ul style="list-style-type: none"> <li>Define a vision statement of goals for the organisation for the coming financial year.</li> <li>Refer to your organisation's overall Mission and Vision as a guide.</li> <li>If you wish, also create a vision statement for each <b>priority area</b>:</li> <li><b>Quality and Efficiency (Programmes)</b></li> <li><b>External Recognition (Marketing)</b></li> <li><b>Financial (Fundraising &amp; Budget)</b></li> <li><b>Successful Outcomes (Monitoring &amp; Evaluation)</b></li> <li><b>Talent and Partner Acquisition &amp; Retention (HR and Programmes)</b></li> </ul>	<ul style="list-style-type: none"> <li>Define <b>1-3 goals in each priority area</b> to meet in order to reach the vision.</li> <li>For each goal identify <b>1-4 activities</b> that need to be implemented to reach the goal.</li> <li>List the activities out <b>chronologically by quarter</b>.</li> <li>Activities should be <b>specific, realistic, with measurable targets with a clear relation to the goal</b> (e.g. if goal is "get 4 new partners" then activity could be "reach out to 10 possible partners" each quarter).</li> </ul>	<ul style="list-style-type: none"> <li>Identify the resources (<b>financial and human</b>) needed for each activity in the pursuit of the different goals.</li> <li>Leadership <b>allocates responsibilities</b> to different staff members.</li> </ul>
Cash Flow Creation	Distribution	Identify Critical Areas	Follow up & Review
<ul style="list-style-type: none"> <li>Refer to the AIP to create your cash flow for the year. Cash flow will be based on <b>the financial resources allocated</b> for different activities.</li> <li>The cash flow will have a strong link with the budget for the year.</li> <li>See also: <a href="#">Cash Flow Management</a> section in <a href="#">Finance</a></li> </ul>	<ul style="list-style-type: none"> <li>Once completed, the AIP should be presented to the <b>board</b>.</li> <li>Once the board approves the plan, distribute to all <b>staff members</b>.</li> <li>It is important to have the buy in from every staff member in order to achieve the goals. Make sure everyone feels a <b>collective responsibility</b> for meeting targets.</li> <li>One method is to hold an intensive workshop to roll out the plan and get inputs from all the staff members.</li> </ul>	<ul style="list-style-type: none"> <li>Identify the most <b>critical areas</b> for the organisation-- the areas that take most priority and/or require the most resources.</li> <li>This will allow managers, and HR if necessary, <b>to allocate people and time</b> to support the activities in those areas during the year.</li> </ul>	<ul style="list-style-type: none"> <li>The organisation leadership should set a <b>timeframe for internal reviews</b> (monthly or quarterly) with the entire team to follow up on the status of each activity and progress towards the goals.</li> <li>The annual implementation plan should be a <b>flexible document</b> and the organisation should make adjustments whenever required.</li> </ul>