

Blueprint: Annual Implementation Plan



An **Annual Implementation Plan** is the process of linking long term strategic goals and objectives to short term goals and objectives. It describes milestones, conditions of success and people responsible in achieving the short term goals. It also explains what activities within a set strategic plan will be completed during a given operational period and how that will happen.

- Need**
- Organisation has a strategic plan for the next few years and needs to break it down into a detailed quarterly plan for the next year.
 - Organisation 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 organisation’s future plan to every staff member. To ensure all stakeholders and team members are clear about their role in assisting the organisation in achieving its short term goals

- 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/person responsible and Status
- Tools**
- AIP Template

- Keys to Success**
- Involve both the leadership team and 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 usually reflect all areas that almost every organisation focuses on over its lifespan. However, depending on the current Life Stage of the organisation, the AIP might only contain a few priority areas that need to be addressed immediately. The AIP can be used flexibly according to your needs.
 - It might be a good idea to seek external inputs on the AIP once it is ready. You could ask your board or any other external strategic consultant to review it.

Annual Implementation Plan: Step-by-Step

Introduction and Review	Define Goals & Activities	Allocation of Resources
<ul style="list-style-type: none"> Review the organisation’s current strategies as per the Strategic Plan. Consider: <ul style="list-style-type: none"> The organisation's current Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis Based on last year's activities and learnings, what does the organisation need to stop, start and continue New objectives for the year New opportunities coming up given by the changing scenario Leadership and team members should work together on the AIP to promote ownership and collaboration. 	<ul style="list-style-type: none"> Define 1-3 goals in each priority area to meet in order to reach the vision. For each goal identify 1-4 activities that need to be implemented to reach the goal. List the activities out chronologically by quarter. Activities should be specific, realistic, with measurable milestone targets with a clear relation to the goal (e.g. if goal is “get 4 new partners” then activity could be “reach out to 10 possible partners” each quarter). 	<ul style="list-style-type: none"> Identify the resources (financial and human) needed for each activity in the pursuit of the different goals. All team members take up responsibilities based on their area of work, expertise, interest and bandwidth. For any unallocated tasks, the leadership team can take a call on who is best suited to own those pieces.
Review Budget	Distribution	Follow up & Review
<ul style="list-style-type: none"> The AIP should be created keeping in mind the Annual budget. This is to ensure the organisation has sufficient resources to achieve the short term goals it has set itself. An organisation can do this 2 ways: <ol style="list-style-type: none"> Create an Annual Budget (Refer to Finance Section) and accordingly create a realistic Annual Implementation Plan Create the AIP and accordingly create your Annual Budget for the year as per the activities The cash flow and Annual Budget will have a strong link with the AIP for the year. See also: Annual Budget section in Finances 	<ul style="list-style-type: none"> Once completed, the AIP should be presented to the board. Once the board approves the plan, distribute to all staff members. It is important to have the buy in from every staff member in order to achieve the goals. Make sure everyone feels a collective responsibility for meeting targets. One method is to hold an intensive workshop to roll out the plan and get inputs from all the staff members. 	<ul style="list-style-type: none"> The organization’s leadership should set a timeframe for internal reviews (monthly or quarterly) with the entire team to follow up on the status of each activity and progress towards the goals. The annual implementation plan should be a flexible document and the organisation should make adjustments whenever required.