

PLANNING, ORGANIZING AND CO-ORDINATING

Planning, Organizing and Co-ordinating involves proactively planning, establishing priorities and allocating resources. It is expressed by developing and implementing increasingly complex plans. It also involves monitoring and adjusting work to accomplish goals and deliver to the organization's mandate.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> • keeping your records and documentation well organized and up-to-date 	<ul style="list-style-type: none"> • maintaining messy or incomplete records
<ul style="list-style-type: none"> • monitoring your progress against goals and deadlines 	<ul style="list-style-type: none"> • doing your work as best you can and letting management worry about deadlines
<ul style="list-style-type: none"> • managing your time – especially in anticipation of peak workloads 	<ul style="list-style-type: none"> • getting bogged down by various demands
<ul style="list-style-type: none"> • creating clear plans, including defining deadlines and accountabilities for those involved 	<ul style="list-style-type: none"> • assuming it will all work out somehow – since it always does
<ul style="list-style-type: none"> • putting time aside for planning 	<ul style="list-style-type: none"> • throwing yourself blindly into the details of a piece of work, because it appears exciting and challenging
<ul style="list-style-type: none"> • communicating your expectation to others of their role within a project 	<ul style="list-style-type: none"> • becoming distracted by other people, or other projects
<ul style="list-style-type: none"> • being resilient, and dealing proactively with obstacles 	<ul style="list-style-type: none"> • letting the situation take control of your actions

**Developmental
Activities**

Level 1 Activities

Spend some time organizing your workspace and records.

- The first step towards higher Planning, Organizing and Co-ordinating is to invest time in organizing your immediate workspace.
- You may find using a To Do list or appointment calendar will help to organize your work.

Reflection Tip:

- * What additional materials or processes would assist you in organizing your work?

Identify one or two colleagues who are especially effective at Planning, Organizing and Coordinating and work to improve your relationship with them.

- Set a goal to have at least one conversation with these colleagues each week.
- Focus on learning about the people; what do they do? what are they good at? and what are their interests?
- Discuss how they have handled similar work situations to yours. Listen carefully and evaluate which approaches would work best for you.
- Keep in touch with them on a regular basis.

Reflection Tip:

- * Your goal here is to investigate what it is, at a deeper level, that allows these people to be effective at this competency. Use this knowledge to improve your own performance.

Ask for regular feedback regarding your Planning, Organizing and Co-ordinating.

- Ask your manager and team members if you are showing an appropriate level of Planning, Organizing and Co-ordinating.
- For example, you could ask:
 - ⇒ "Am I crystal clear when I communicate about the work we are doing?"
 - ⇒ "Am I well organized in my work?"
 - ⇒ "Can you think of any times when I haven't effectively planned a project?"
 - ⇒ "Can you think of a time when I haven't been able to switch gears, and shift priorities, as necessary?"
- If the feedback is good take a moment to enjoy your success. If the feedback is poor, ask additional questions so that you are clear about what needs improving.

Reflection Tip:

- * Was there any feedback that surprised you? If so, be sure you fully understand the message.

Ask your manager to identify someone who shows strong Planning, Organizing and Co-ordinating.

- Observe how he or she organizes and monitors work. Use this individual as a role model.

Reflection Tip:

- * After some time, reflect on what you have learned from this individual and how you can integrate that learning with the way you work.

Monitor initiatives/assignments against milestones, deadlines or quality standards that have been set.

- Set milestones or goal deadlines and regularly assess yourself against those deadlines. Beware of the tendency to be overly optimistic about how long each step will take.
- Meet regularly with other team members throughout an initiative/assignment to discuss how you are doing with respect to deliverables.
- Regularly update the relevant people on the status of your work. If a deliverable is falling short of its targets, make sure that impacted groups/individuals are notified right away.
- Talk to the appropriate individuals to find out the impact of non-delivery and agree on next steps.
- Seek feedback on your performance from whoever assigned the work.

Level 2-3 Activities

Consider the following general tips to improve your ability to manage resources within a project.

- Plan how you can effectively use resources to accomplish your goals, assignments or projects.
- Monitor your progress against milestones.
- Take the time to get a detailed understanding of the systems, programs and resources needed to complete your projects.
- Clear away bureaucratic barriers or other problems that make it difficult for you or your staff to get the project done.

Analyze the organization charts to familiarize yourself with resources across the organization.

- Identify the various functions in the organization and familiarize yourself with their business needs and roles.
- Take action to learn more about functions closer to your business needs. Review the organizational chart and contact colleagues in the area to learn more about what they do and the resources they have.

Reflection Tip:

- * Are you utilizing resources as effectively as you could be? What changes could be made to increase efficiency, or productivity?

Set clear performance objectives for yourself and anyone else involved in your projects.

- These objectives should be:
 - ⇒ *Specific*: describes what the end result will look like
 - ⇒ *Measurable*: expressed in quantifiable terms
 - ⇒ *Attainable*: the goal is realistic
 - ⇒ *Relevant*: linked to organization or unit goals
 - ⇒ *Timeframed*: provide target completion dates.
- Communicate these objectives to your supervisor and ask for his/her input and support.
- Compare performance to the standards that you have set in each area of accountability on a regular basis (e.g., quarterly, annually). Encourage others working in your project to do the same.
- Seek advice on those performance objectives that you are having trouble meeting. Encourage others to do the same.

Clarify expectations and develop a plan.

- When accepting a new project or activity, clarify your immediate supervisor's expectations and your role. Define key deliverables and accountabilities.
- Write a plan which lists:
 - ⇒ the key activities to be performed,
 - ⇒ who will perform the activity,
 - ⇒ who will provide assistance,
 - ⇒ the expected outcome of each activity,
 - ⇒ when it will be completed,
 - ⇒ the required resources, and

⇒ how you will measure whether the activity is completed to the standards established.

- Share this plan with your supervisor and clarify any concerns or issues he/she may raise.
- Regularly track your performance using this plan. Identify when activities are completed and/or milestones are met. If there is any “slippage” in your plan, identify the cause and problem-solve using whatever resources necessary to overcome the obstacle(s) and place this project back on line.
- When delegating tasks or projects to members of your team or when changes occur, clarify your expectations in writing and monitor their progress regularly, keeping notes to assist you in reviewing their performance.

Reflection Tips:

- * Are there any other details that need to be defined at the beginning of a project?
- * Are there any organizational guidelines that might assist you in determining which details should be established at the beginning of each project?

Level 4 Activities

When assigning tasks and projects, develop mechanisms that allow you and your team to monitor progress against goals.

- For example, have the team members prepare interim progress reports or schedule regular update meetings to provide feedback regarding their progress against goals.
- Encourage them to share progress informally with relevant parties.
- Communicate to team members that they should inform the appropriate individual of problems early before they become more serious.

Reflection Tip:

- * What other steps could be taken to monitor progress against goals? Check with peers inside, and outside of the Ministry.

Take specific steps to keep yourself, and all team members focused on achieving the ultimate goals and objectives.

- Ensure that each person understands how his or her role contributes to the overall success of the project.
- Remember that the team must work cohesively to accomplish its goals.
- Help the group to stay focused on its common goal.

Reflection Tip:

- * What specific activities were most helpful in keeping yourself and others focused?

Organize and execute project priorities with others.

- Talk to people about relevant issues, concerns, approaches or ideas relating to a current project.
- Use a matrix to decide what activities need to be prioritized and then determine who should do them. For example, Steven Covey makes reference in his book “The Seven Habits of Highly Effective People”, to a time management matrix that lists activities as urgent and not urgent, important and not important.

		URGENT	NOT URGENT
IMPORTANT	I. Activities	Crises Pressing Problems Deadline Driven Projects	II. Activities Prevention Relationship Building Recognizing new opportunities Planning Recreation
	III. Activities	Interruptions, Service Calls Service Mail, Source Reports Some meetings Proximate, pressing matters Popular Activities	IV. Activities Trivia, busy work Some mail Some phone calls Time wasters Pleasant Activities
NOT IMPORTANT			

- ⇒ **Quadrant I** activities are crises and current projects which require immediate attention. Consider involving others, as necessary, to help with project deadlines or urgent tasks.
- ⇒ **Quadrant II** activities are priorities that need to be scheduled. Organize your work week and incorporate actions supporting these activities. Also look ahead to anticipate additional actions relating to these activities. “Pencil” time in your schedule for this.
- ⇒ **Quadrant III and IV** activities include phone calls, answering mail, attending some meetings. These activities should be done but are not urgent or as important. Consider putting a process in place to handle these sorts of activities on an ongoing basis.

- Discuss as appropriate, with others which activities are priorities and who will be accountable for ensuring they are completed.

Look ahead for opportunities and problems.

- Conduct a scenario planning session on your own, or with your project team:
 - ⇒ Identify what could happen in the next six months (either positive or negative) that could take you off track, regarding planned actions, for a particular project.
 - ⇒ Describe the possible scenarios.

⇒ Develop a plan to handle these situations if they should arise.

- Assess whether the forecasts actually materialized and were effectively dealt with.

Reflection Tip:

- * Broaden your scope for this activity to think beyond the details of the project, to consider organizational events and issues, and the potential impact.