ANNUAL PLANNING: TURNING STRATEGY INTO ACTION

What is Annual Planning?

Annual planning is the process of deciding what your organisation will achieve in the coming year—and how you will resource it. It connects your long-term strategy to day-to-day operations, ensuring your team is focused, aligned, and realistic about what can be delivered.

1 START WITH ORGANISATIONAL CAPACITY

Before setting priorities, assess your ability to deliver.

- HR Review: staffing needs, performance, and satisfaction
- Governance Review: board effectiveness and oversight
- Systems Review: tools, technology, and operational efficiency

✓ ***Key question: Do we have the people, structure, and systems to deliver?***

2 SET CLEAR AND FOCUSED PRIORITIES

Use data and reflection to determine what matters most.

- Conduct a needs and performance review
- Apply a priority filter
- Align with your strategy and theory of change

✓ ***Tip: If everything is a priority, nothing is.***

3 DEVELOP YOUR OPERATIONAL PLAN

Translate priorities into action.

- Define activities, timelines, and responsibilities
- Ensure alignment with strategic goals
- Create a clear, board-approved workplan

✓ ***Output: A practical, achievable implementation plan for the year.***

4 ALIGN BUDGET AND FUNDING

Your plan must match your resources.

- Build a budget based on priorities
- Forecast income and expenses realistically
- Develop a fund development plan
- Explore opportunities for growth and diversification

✓ ***Key question: Can we afford what we are planning to do?***

5 IDENTIFY RISKS AND PLAN AHEAD

Anticipate challenges early.

- Review risks from strategy, operations, and finance
- Identify gaps and vulnerabilities
- Build mitigation strategies into your plan

✓ ***Outcome: More resilient and informed decision-making.***

6 DEFINE SUCCESS AND TRACK PROGRESS

Establish how you will measure performance.

- Set KPIs and quality indicators
- Develop a monitoring dashboard
- Review progress quarterly

✓ ***Goal: Stay on track and adapt as needed.***

TAKEAWAY

Strong annual planning creates focus, alignment, and accountability—ensuring your organisation delivers on what matters most.

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