

Tab 13 ~

Effective Planning in PACs and DPACs

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Effective Planning in PACs and DPACs

If your group exists to do something, rather than for something to do, you need to organize!

*From Plan for action!
BCCPAC Inclusive PACs
and DPACs Series*

Effective volunteer organizations pay close attention to planning. Planning moves the organization forward by

- focusing the group on its purposes, goals, and decisions
- building interest, enthusiasm, and commitment among members
- enabling the group to put the organization's beliefs and decisions into action.

Through the planning process, your council will ensure that its goals and decisions are capable of being carried out with the resources, people, and time available. You will reinforce your members' commitment to the tasks the council has chosen—and you will be better able to recognize and celebrate your successes.

Types of Planning

PACs and DPACs do two basic *types* of planning:

- setting annual goals and priorities (long-term planning)
- planning for action on specific decisions (short-term planning).

There are three steps to planning:

- Make the plan.
- Implement the plan.
- Evaluate the plan.

Annual planning and priority-setting

It is important for your council to have an annual plan and clear priorities. An annual plan gives direction to the membership and executive for the coming year, and lets others in your school and district know what to expect from your council in the months ahead.

Annual planning should include a year-end evaluation. A close look at what your council has done during the year will lead naturally into goal-setting for the following year. Year-to-year continuity will enhance the effectiveness of your council.

More on **Year-End Evaluation** on page 8 of this **Tab 13**.

Planning for action on a decision

Good decision-making includes planning for action on the decision. Whenever your council makes a decision, consider how the decision will be implemented.

Ideally as soon as the decision is made (at the same or a later meeting), invite members to join in action-planning. This will preserve the support that was achieved for the decision during the decision-making process. The greater the support, the more likely the decision will endure.

For more on decision-making, see **Tab 9, Decision-Making in PACs, DPACs, and School Planning Councils.**

The Planning Process

In planning, you need to keep your eye on the prize.

An effective long-term planning strategy uses five *planning questions* to focus and direct the group.¹ Consider using this process for annual planning. Short-term planning will make use of Questions Four and Five.

- Question One:** *Where have we been?*
Question Two: *Where are we now?*
Question Three: *Where do we want to go?*
Question Four: *How are we going to get there?*
Question Five: *How will we know we have arrived?*

Set aside a significant part of a meeting (or schedule a special meeting) for this process. As you take the group through these questions, designate a recorder to keep notes on flip chart paper or the chalkboard.

Question One: *Where have we been?*

The purpose of **Question One** is to

- reflect on the history of your council
- recognize accomplishments
- recall challenges and how they were resolved.

¹ *The Planning Questions* are used with permission of Don Cameron Associates, copyright 2002.

Invite members to share two or three stories, and ask them to reflect on the following questions:

- Is this event or accomplishment typical of the kinds of things our council does?
- What does it show about our council?

Question Two: *Where are we now?*

The purpose of **Question Two** is to

- gather information about the status of your council
- identify your council's main areas of interest
- identify your council's strengths and weaknesses
- identify threats and opportunities.

Here, you are taking stock of your council as it is today. This is necessary before you can decide where you want to go from here. Points to consider are

- level of interest shown in your council—Who comes to meetings? Who is missing? What kind of response do you get when you ask for participation or volunteers?
- your organizational structure—How well are your executive and committees functioning? How do your members feel about the council overall?
- educational issues the council is addressing
- the council's relations with school and district staff and officials.

Question Three: *Where do we want to go?*

The purpose of **Question Three** is to

- develop a vision and goals for the future of your council
- create a statement to show others where your council will be by the end of the year or in 1-2 years.

This is perhaps the most important step in the planning process. Here, you will envision your council's future. Everything you do from this point forward will come out of this part of your plan.

As you consider Question Three, keep in mind the purposes of your council as listed in your constitution. Everything you decide must be consistent with your purposes.

Does our objective or goal fit with the purposes of our council?

Does it fit with our budget?

Also consider your council's budget. You cannot bind future executives to expenditures—an approved budget lasts only for a specified period, usually the school year or term of the executive.

Question Four: *How are we going to get there?*

The purpose of **Question Four** is to

- identify what your council will do to achieve its vision for the future, or to implement a decision
- identify opportunities for success
- identify barriers to success and ways to overcome them
- outline and prioritize steps.

When a group *commits* to a plan, they almost always achieve it.

Here, you will decide what your members will do. Be specific—

- **Who** will be involved?
- **What** task will each person do?
- **How** will each person do their task? What will the person need?
- By **when** will the task be done?
- What, if any, problems will each person face? How can the problems be resolved?

Question Five: *How will we know we have arrived?*

The purpose of **Question Five** is to

- identify ways to monitor progress towards your council's goals and decisions
- measure results from specific activities
- measure broader results that may come from a series of activities or a course of action.

The **Sample Annual Plan** and **Sample Action Plan** on the following pages show you one way to chart an *implementation* strategy that includes

- a list of goals, tasks, names, resources, and timeline
- a schedule of meetings or consultations to monitor progress
- indicators of success along the way.

Sample Annual Plan

Great Elementary School PAC Annual Plan 2004-2005			
Goal	Who will do it? (by name)	Material/resources/information required (special equipment, documents or information, consultation with others, funding)	By when? (date to report, date to complete)
Update constitution and bylaws	Constitution/Bylaw Committee—list members	Sample BCCPAC constitution and bylaws	Nov. 1/04—First draft to executive for discussion Dec. 1/04—Second draft to executive Dec. 15/04 general meeting—Present to membership for discussion and questions Feb. 15/05 general meeting—Present to membership for approval
Improve communication to membership	Communication Committee—list members	Photocopy resources Parent e-mail list Access to school website	Oct. 1/04—Draft communication plan to executive for discussion Oct. 15/04—Discussion at general meeting Nov. 1/04—Initial implementation Jan. 15/05—Review of implementation
Hold a series of information sessions on school planning	Executive in consultation with SPC representatives—list members	Current school plan School District Accountability Contract School and district data Ministry of Education data	Oct. 1/04—Draft overall plan of sessions to be offered Oct. 15/04—Present plan at general meeting Nov. 1/04—Assign responsibilities for each session

Note: Each goal in the Annual Plan can be broken down into smaller parts. The **Sample Action Plan** on the next page deals with one of the information sessions on school planning.

Sample Action Plan

Great Elementary School PAC Action Plan			
Decision: Hold an information session on the School District Accountability Contract, January 15, 2005			
What needs to be done? (list each action required to implement the decision)	Who will do it? (by name)	Material/resources/information required (special equipment, documents or information, consultation with others, funding)	By when? (date to report, date to complete)
Invite Superintendent	President (name)		Nov. 15/04
Reserve school library	Secretary (name)		Nov. 15/04
Obtain copies of Accountability Contract and supporting policies and other documents	Vice-President (name)		Dec. 1/04
Prepare and issue invitation to all parents and staff	Secretary (name)	PAC/school newsletter PAC/school website and/or e-mail Phone-out to class reps	Dec. 1/04
Arrange volunteers for room set-up	Committee members (name)	Podium, chairs, overhead/LCD projector, screen, flip chart stand, paper, felt pens	Dec. 15/04
Arrange volunteers for refreshments	Committee members (name)	Money allocated from PAC budget to cover cost of refreshments Large coffee pot	Dec. 15/04
Consider how to include parents who will not or cannot attend	All executive	Phone-out survey with specific questions; results to be presented at meeting	Jan. 10/05
Photocopy and collate all materials for meeting	Secretary (name), with help of 2 volunteers	Access to school photocopying	Jan. 10/05
Phone Superintendent's office to confirm invitation	President (name)		Jan. 10/05
Issue reminder to all parents and staff	Secretary (name)	Flyer Website/email Bulletin board Electronic sign or sandwich board School PA announcement	Jan. 13/05

Year-End Evaluation

At year-end, set aside some meeting time to look back on the year and reflect on the council's progress.

Annual reports are important because they

- provide an opportunity to review personal and council goals and achievements
- provide a record of actions taken
- outline responsibilities for those considering running for an executive position.

All executive members and committee chairs should prepare an annual report. The president's report should summarize the year's activities, identify successes and challenges, and thank various people. These reports can be collated into a booklet and copies made for members before and at the meeting.

Ask your members to consider the following questions:

- Did your council have a positive impact in advising the board, principal, and staff on educational issues in your school or district?
- Which parent education programs were successful? Which were not? Why not?
- Which events and activities were successful? Which were not? Why not?
- Did the council accomplish its priorities?
- On reflection, were the council's goals and priorities reasonable and able to be accomplished?

Invite your members to ask questions of the executive and committee chairs on their reports.

Year-end evaluation is a time to thank everyone for their contribution during the year.

This is an opportunity to lead into annual planning for next year. Ask members for ideas and suggestions based on the year-end review. Planning for next year should not necessarily be completed at the same meeting. It will require time and preparation by the executive, and you will want to include new parents to the council.

A note on societies and registered charities

If your council is a society under the Society Act, or a registered charity under the Income Tax Act, there are special year-end reporting requirements.

For information on societies, contact the Society/Cooperative Association Unit at 250-356-8673, (in Greater Vancouver, direct dial 604-775-1046), or consult *Information for Incorporation of a British Columbia Society*, available on the web at

✓ www.fin.gov.bc.ca/registries/corppg/forms/reg20.pdf

For information on registered charities, contact Canada Customs and Revenue Agency at

✓ www.ccra-adrc.gc.ca/charities/

