

2

PLANNING



community resource kit



For full details and contents of the kit please read the introduction at www.community.net.nz/how-toguides/crk.

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As well as printed copies, the Community Resource Kit will be available on CD and online at www.community.net.nz. Any future updates to the kit and details of where to obtain further copies of it will also be posted on this website.

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introduction



why plan?

A plan is a *method by which something is to be done*. It is like a recipe – it records not only the ingredients and their quantities, but also how you put it all together and in what order.

Planning can be quite simple or very complicated. The trick is to get the balance right for the size of your group – for example, not everyone will need a communications plan and many smaller groups may combine their strategic and operational plans.

Your community group needs a plan (or a set of plans), primarily for itself but also for your clients. Without plans your group may:

- be less likely to go forward together as one organisation, with one vision
- be unclear about whether or not you are achieving your vision
- seem less credible to others
- run into difficulties that could have been avoided.

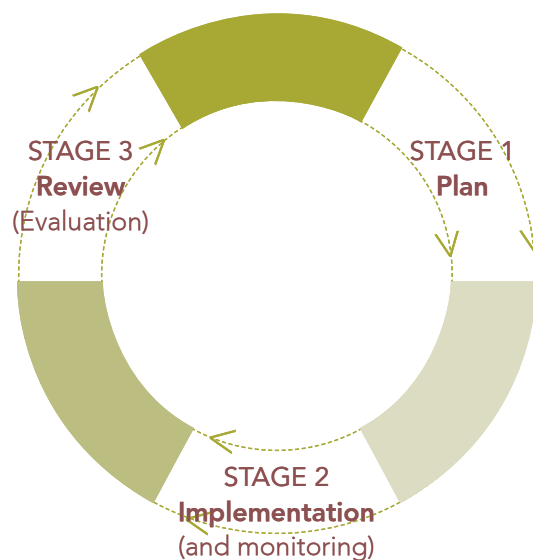
Once a plan has been developed, a common mistake made by groups is not to review their progress and update their plan. To be of any use, a plan needs to be a living document that can be changed as your organisation changes to meet the changing needs of your community.

what's in this section?

This section covers a range of areas to do with planning for community groups. It is designed to give groups some guidelines for planning and evaluation processes which are basically the same regardless of what type of plan you're developing (see **Figure 1**).

This section also links to several others in the kit, namely *Section 1 – Getting Started*, *Section 3 – Organisational Structures*, *Section 6 – Financial Management* and *Section 9 – Communication*.

Figure 1: Planning/Evaluation Cycle



types of plans

There are several different types of plans that are useful for community groups (see **Table 1**). Each of these plans is dealt with below or elsewhere in the kit as indicated.

Table 1: Types of Plans

TYPE OF PLAN	DESCRIPTION	TIMESCALE	RESPONSIBILITY
Strategic plan	<ul style="list-style-type: none"> looks at the kaupapa and long term outcomes for the group sets the overall vision/mission and the broad strategic direction of the group sets out how you plan to achieve these outcomes. 	<ul style="list-style-type: none"> 3 -10 years performance measured annually 	Governing body (the committee/ board)
Operational plan/ business plan (also called annual plan)	<ul style="list-style-type: none"> more detailed plan – the steps to make the strategic plan happen includes SMART¹ objectives monitored at regular (monthly/quarterly) management committee meetings may include sub-plans e.g. <ul style="list-style-type: none"> financial plan/budget/ funding calendar marketing plan communications plan. 	Annual	Management (with people specified for all the detailed action steps)
Project plan (may also be called action plan)	A detailed plan for a specific project or event – sometimes referred to as event management or project management.	One-off, as required	Management (usually with a project manager)
Financial plan	Includes a budget and forecast (see <i>Section 6 – Financial Management</i>).	Usually annual	Treasurer (with other people in the organisation)
Communications plan	May relate to the overall communication activity of the group, or to a specific project or programme (see <i>Section 9 – Communication</i>).	Often associated with specific projects	Management
Marketing plan	Linked to the operational (or business) plan, the marketing plan focuses on how your group reaches its market(s), which may include members (current and potential) as well as the wider community/clients.	Annual – links to operational plan	Management
Feasibility study	An initial planning process to check on whether the idea for a community project/organisation is realistic (feasible).	Before setting up your group and/or before starting a major project	Management
Risk management plan	A plan that documents how you can reduce potentially significant risks.	Often associated with specific projects	Management

¹ Specific, Measurable, Achievable, Realistic and with a Timeframe.

strategic planning

the process

NEW GROUPS

Strategic planning involves setting the vision for what you want your group to achieve, and at least some idea of how that might be done.

In *Section 1 – Getting Started* we dealt briefly with the kind of strategic planning your group should do **before** deciding whether to set up a formal organisation or not.

Some tips on the strategic planning process **after** you've decided to start setting up your new group are:

- Try and do your strategic planning in 2 or 3 half- or full-day sessions and cover the following:
 - Set the scene – identify your vision, purpose or mission and values/principles (your kaupapa and tikanga).
 - Environmental scan (see below) – look at what's currently going on in the wider community and what's planned for the future that may impact on your work.
 - PEST/SWOT¹ and stakeholder analysis (see below) – what can help or get in the way of achieving the mission.
 - How you plan to get there – setting the more specific goals (or outcomes) and strategies. Keep this list short – a maximum of three goals (or intermediate outcomes). This leads into the operational plan which can be done at the same time.
- If possible, get someone outside of your organisation to facilitate the planning.
- Use large sheets of paper or a whiteboard with coloured pens, to record the brainstorm sessions.

¹ PEST: Political, Environmental, Social and Technology factors; SWOT: Strengths, Weaknesses, Opportunities and Threats.

ESTABLISHED GROUPS

If you're an established group, the above processes would have already been done, but you should review your plans.

You can start with your group's mission statement and objectives, which will be set out in your constitution and possibly in previous strategic plans. If your mission statement and objectives have changed since you wrote them, there is a formal process to follow to update your constitution (see *Section 3 – Organisational Structures*).

strategic planning tools

ENVIRONMENTAL SCAN

This is sometimes called a "situational analysis".

An environmental scan means checking on what's going on, or what may happen in the future, that may have an impact on your work. The things to consider are:

- what's happening in the wider community that may affect your group/the people it works with
- any trends or developments planned in the future.

You should consider a wide range of areas – such as transport, new subdivisions planned, employment, new industries or factories closing, population trends (aging population, migration – both within New Zealand and internationally, ethnicity changes etc).

Some sources of information for carrying out an environmental scan are:

- **Public information**
 - Local authorities are required to develop Long-Term Council Community Plans (LTCCPs) and to facilitate Community Outcome Processes (COPs), whereby the communities identify the social, economic, environmental and cultural outcomes they want for community well-being. The LTCCP will also include a regional profile, which will have information about your community.

- Local authorities will also have a range of other relevant information regarding future developments, trends etc, much of which can be obtained from their websites.
- Statistical information is available from Statistics New Zealand – www.stats.govt.nz.
- Family and Community Services (FACS) within the Ministry of Social Development (MSD), has developed Local Services Mapping (LSM) material.

Informal information

- Brainstorm as a group. Between you, your group will have considerable local knowledge to draw on when deciding your priorities.

PEST ANALYSIS

A PEST analysis is a specific example of an environmental scan in which you consider the:

- **p**olitical
- **e**conomic
- **s**ocial and
- **t**echnological

factors that may impact on your organisation, but which are outside your control.

To do a PEST analysis:

1. Under each of the PEST headings, make a list of what factors may impact on your community group.
2. Consider how these factors might impact on your group.

This information will feed into the SWOT analysis (below).

SWOT ANALYSIS

A SWOT analysis is another useful tool to map out a range of factors that will have an impact on your organisation – both internal (which you can influence) and external (see **Figure 1**).

The PEST analysis (above) will provide you with information about the external factors i.e. the “OT” (or “**o**pportunities” and “**t**hreats”) part of the SWOT analysis.

To do a SWOT analysis:

1. Draw up a large sheet of paper or whiteboard as follows:

Figure 1: SWOT Analysis Template

Internal factors (things about your group)	Strengths	Weaknesses
	Opportunities	Threats

2. Complete the template by writing down the internal and external factors that will have an impact on your organisation.

STAKEHOLDER ANALYSIS

A stakeholder is someone who has a direct interest in the services your organisation provides. A stakeholder can be, for example, a client, a volunteer in your organisation, or another organisation that uses your services.

A stakeholder analysis will map the people or organisations that may impact on your group and identify the nature of this impact (see **Figure 2**). This provides information that you can use when developing your strategic plan, and is also very useful when planning any communications (see *Section 9 – Communication*).

To do a stakeholder analysis:

1. Draw up a large sheet of paper or whiteboard as follows:

Figure 2: Stakeholder Analysis Map

STAKEHOLDERS	ROLE/ RELATIONSHIP	INFLUENCES	INTER- RELATIONSHIPS	STRATEGIES/ MANAGEMENT
Community Groups: 1. 2. etc				
"Clients" / community				
Funders				
Neighbours				
etc				

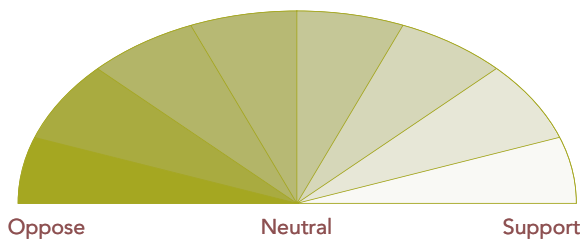
2. In the first column (Stakeholders), list all the people and organisations that have an interest in what you're doing. Include:
 - the people that you are working with/providing services to
 - other community groups in the area – look at how you may work together, and/or refer people on to more appropriate services
 - the people in the organisation – staff, volunteers, committee/board members
 - funders (actual and potential).
3. In the second column (Role/relationship), write down what each stakeholder's particular role or relationship is with you.
4. In the third column (Influences), write down what influence each stakeholder has or may have (see also the "force field analysis" below).
5. In the fourth column (Inter-relationships), write down any inter-relationships (e.g. people involved in different groups, or personal relationships with stakeholders) that may be useful.
6. In the last column (Strategies/management), write down the implications of this stakeholder relationship for your group and what you need to do (i.e. the strategies) to make the relationship work (if this is possible). A force field analysis will help you complete this last column.

(Adapted from *Toolkit for Managers, Public Health*).

FORCE FIELD ANALYSIS

A force field analysis provides another tool to use when identifying the influence that stakeholders may have and how to make these relationships work. In this analysis, you place your key stakeholders on the “force field” according to whether they support, oppose, or are neutral about what you’re doing (see **Figure 3**).

Figure 3: Force Field Analysis Template



From this template, you can develop strategies to build your support and manage your opposition by:

- getting your supporters more actively involved in supporting you
- bringing the “neutral” people on board e.g. by direct communication
- targeting your opponents e.g. by building relationships or strategically opposing them.

Record these strategies in the last column of the stakeholder analysis map (see **Figure 2**).

operational planning

An operational plan is the business plan or annual plan for the group. Whereas the strategic plan looks at the long-term strategy (i.e. how you will achieve your ultimate goals and mission), the operational plan (see **Figure 1**) has a shorter-term focus, and is more specific about:

- the actions your group will take
- who is responsible
- how long it will take
- what resources you need
- the progress you are making.

The best way of monitoring your group's progress is to refer to your operational plan when drawing up monthly (or quarterly) reports for your management committee/board.

how to develop an operational plan

To develop an operational plan:

1. On some sheets of paper or whiteboard, draw up templates as follows:

Figure 1: Operational Plan Template

..... Operational Plan for

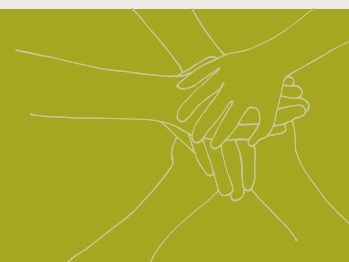
MISSION STATEMENT:

Goal/(Intermediate Outcome)

ACTIONS/ACTIVITIES	RESPONSIBILITY (WHO?)	WHEN BY?	RESOURCE REQUIREMENTS	MONITORING/ UPDATE
1				
2				
etc				

2. Record your "Mission Statement" in the top box.
3. Record your "Goals" in the second box using a separate sheet for each goal.
4. List the main activities and action steps in the first column.
5. State who is responsible in the second column.
6. State when this task should be done by in the third column.
7. List what resources are required in the fourth column.
8. Keep track of the progress you are making in the last column.

project management/planning



Project planning is one of the stages of **project management**.

The planning we have looked at so far in this section relates to your **group** – defining what you want to achieve in the community – and how you plan to make this happen. This section relates to separate, distinct **projects**, events or programmes that you are looking at developing. These will link to the actions or activities in your operational plan.

Project management often refers to large projects, such as building developments or developing a major IT project. However, the basic steps are useful for managing smaller, community-based projects as well.

Any project has a life cycle with the following four distinct phases:

1 project initiation (or start up)

This is where you work out what you are aiming to achieve, what you need to do it and how you will know if you have been successful. This can become the project **terms of reference**, which sets out the overall reasons for, and terms of the project.

The terms of reference document may include the following:

- Name of the project.
- Project manager – you need to have one person who is responsible for co-ordinating and managing the project. This is the person that contractors will work with to get the project done. One of the risks of many community projects is that too many people, all with their own “good ideas”, will all try and have their say.

- Project objective – why it is being done and what you hope to achieve.
- Project deliverables – the specific things that you want to achieve.
- Project scope – what is included and what is not. This may mean you need to be very clear about what you want to have happen – and what you will need to leave out.
- Project inter-dependencies/relationships – what other projects will affect, or be affected by, this project.
- Resource requirements – including time and money.
- Overall project schedule and deadlines – when it is to be completed.
- Risks – what might threaten the project (see separate section on “Risk Management” below).

2 project planning

This is the “what, where, when, who and how” stage. In this stage you work out the detailed tasks to be done and map it out on a project schedule or GANTT¹ chart (see **Figure 1**).

¹ Named after Henry Gantt who designed it, a GANTT chart is a popular type of bar chart, that aims to show the timing of tasks or activities as they occur over time (www.en.wikipedia.org/wiki/Gantt_chart or www.ganttchart.com).

To create a project schedule (or GANTT chart):

1. On a whiteboard or large piece of paper, draw up the following template:

Figure 1: Project Schedule (or GANTT chart)

TASK (EXAMPLES ONLY)	RESPONSIBILITY	FEB	MARCH	APRIL	MAY	JUNE
Develop the project plan	Jack	→				
Obtain sponsorship	Hine	→				
Finalise programme	Esme		→	→		
Print programme					→	
etc.						

2. List the action steps (tasks) down the left hand side.
3. Next to each action, write the name of the person responsible.
4. Mark on the calendar the deadline for each step, and the length of time the step will take. Note the interrelationships between the steps where you may see critical times when a number of things are scheduled to happen at the same time.
5. Keep track of the progress against the plan.

The planning stage may also include drawing up the following plans and documents:

- risk register and management plan (see separate section on “Risk Management”)
- communications plan (see *Section 9 – Communication*)
- budget (see *Section 6 – Financial Management*).

3

implementation phase

This is the “doing” stage of the project.

In this phase you can expect to come across some unforeseen issues that may mean the project will take longer, cost more and/or not be up to the quality you had hoped for. Perhaps you overlooked an important item when you defined the scope, and now need to include it. An effective control system is needed to keep track of these issues.

Depending on the scale and complexity of the project, you should:

- have a system to monitor progress, budget/expenditure and risks
- have a system to approve changes to the project scope
- produce regular (e.g. monthly) reports for your management committee or board including:
 - progress against the project plan – especially noting any delays
 - financial update
 - any communication about the project
 - significant risks – and how you plan to manage them.

In larger projects or organisations, you can expect to have a change management process and a range of other forms and registers, such as an Issues Register and Project Change Request forms that need to be signed off to approve changes.

4

project closure

As the name implies, this phase is the last stage of the project. In many situations there will be some ongoing work resulting from the project – such as the ongoing maintenance of a resource that you have developed, and it is easy for this stage to drift into “business as usual”.

Four things to do in the project closure stage are:

1. Tidy up the “loose ends” making a note of what needs to be carried over as “business as usual”.
2. Project evaluation – checking:
 - whether the project met its objectives
 - how well it was run
 - what you learned that may help for future projects. Consider both what worked well, and the difficulties you may have faced.
3. Project closure report – to record the project’s completion.
4. Celebration – take a moment to celebrate the completion of this project – before getting caught up in the inevitable next piece of work.

marketing plan



A marketing plan is a sub-set of the operational or business plan. It identifies how you will find out more about your customers' needs, how you will develop existing and new services to match their needs, and how you will let them know.

Essential elements of a marketing plan include:

1. **Service description** – explain exactly what it is that you're marketing e.g. the organisation as a whole or a specific service?
2. **Situational analysis** – briefly summarise the current situation e.g. why your community needs the service.
3. **Service analysis** – are there any other groups offering the same or a similar service in your community? You can use your local knowledge and the Local Services Mapping resource to help you. Is the service offered by the other group meeting the needs of your clients?
4. **Target market(s)** – this is the core target (client) that your programmes are directed towards. It is more specific and usually identifies a particular client group, with specific needs e.g. who is mostly likely to be interested in using your service? What are their demographics e.g. age, gender, ethnicity etc?
5. **Marketing objectives** – you specify what you want to achieve by using a marketing plan. These objectives should be measurable (with timeframes and specific outcomes) and be realistic.
6. **Marketing strategies** – based on all the information you have gathered, what is the main strategic approach that you will take to achieve the marketing objectives?
7. **Pricing** – will you charge for your service? If you do, will it be a flat rate or a sliding rate, dependent on income etc?
8. **Strategic alignments** – what other organisations could you work with to help achieve your objectives?
9. **Promotional activities** – detail the specific things you will do to implement the plan. Always keep in mind who your target audience is and how cost effective each media type (e.g. TV, newspapers etc) is in reaching that audience. It may be more cost effective to use local school and church newsletters or free local papers, as not everyone buys a newspaper.
10. **Budget** – what is the total budget for the plan? Give details of how you plan to spend it.
11. **Performance measures** – how will you measure your objectives and who will do the measuring? You may want to measure things such as customer satisfaction, service usage. Ways to measure these may include customer surveys etc.

(Adapted from *Developing a Marketing Plan*, Te Papa National Services).

feasibility studies



As stated earlier, many community groups, projects and programmes start with one or more people having a dream about how to make a difference in the community, and a passion to make this vision a reality.

A feasibility study is a “reality check” on these dreams – it will give you some information about how realistic your chances of success are – and what pitfalls you can expect to face.

A feasibility study will help you identify:

- What you want the group/programme or project to accomplish in the community. This gets beyond an individual's, or small group's vision to focus on the wider community change you are seeking to make.
- Whether there's a need in the community for the group/programme or project you are thinking about. Is there a demand for the project/programme? How many people are affected or will benefit? Can you link in to existing groups or programmes? What level of support is there in the community for your idea?
- If there is a need, what will it take to make your idea become a reality? What resources will you need and what challenges will you face?

(Adapted from *Starting a New Programme...*, Gottlieb).

The answers to these questions will give you better information to decide whether, or how, to proceed with your project. If you decide to go ahead, the feasibility study links into your operational and project plans.

TIP

Because you will probably be (and will be seen to be) biased in favour of your idea, it is best to get an independent person to do the feasibility study – especially if you intend to use it to raise funds.

risk management



A risk is something that might happen in the future, and could be expected to affect the project, service or programme.

Risks have two aspects:

1. **Probability:** how likely is the particular risk?
2. **Impact:** what are the likely consequences of the event if it does happen?

The trick is to not spend your effort on risks that are either unlikely or won't have a significant impact. Concentrate instead on how you might reduce the impact or likelihood of the **significant risks**.

Risk management includes:

- **Identifying the risks.** As a group, brainstorm the question "what could possibly go wrong?" Look at areas such as your reputation, people – staff, volunteers, clients etc, financial and other resourcing, external events.
- **Rating the risks.** How likely is this risk, and what would the consequence be – on a scale of 1 to 3 (some groups use a 1-5 scale).
 1. Chart this on a risk scoring matrix (see **Figure 1**). To manage risks, you need to try and reduce the risks in the 7-9 band, and then look at how you can manage or reduce the risks in the middle 4-6 band. Don't waste time on the low risks 1-3 band.
 2. Enter the risks in a risk register (see **Figure 2**).

- **Risk management plan.** Concentrate on how you can reduce the risks that score 7-9 on the matrix. Some ways of dealing with the risk are:
 - **Avoidance** – perhaps you can arrange things differently to avoid the risk.
 - **Transfer** – so that someone else takes on the responsibility. This option is usually quite limited.
 - **Mitigation** – if you can't avoid the risk, how can you reduce it? For example, if the risk relates to staffing, a mitigation strategy might be to make sure there is staff back-up available.
 - **Acceptance** – some risks will not go away and some you will be prepared to live with. These are the ones to keep a close watch on. You might look at a fallback plan for these risks.
- **Monitoring and reviewing.** Keep the risk register up to date. Things change and your strategies should reduce some risks. Update the register and review it at each (project) management meeting.
- **Closure.** Risks are about uncertain events in the future. Time passes and the risk either becomes a reality in which case you cope with the event, or not. Either way, the risk is closed. Apart from reviewing your risk management, you do not need to spend any more time on it.

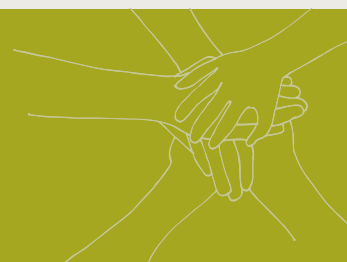
Figure 1: Risk Scoring Matrix

Impact (if risk happens)	severe	6	8	9
	moderate	3	5	7
	minor	1	2	4
		unlikely	possible	probable
Likelihood (of risk occurring)				

Figure 2: Risk Register

RISK NO	DATE LOGGED	RISK DESCRIPTION	RISK SCORE	MANAGEMENT STRATEGY	STATUS (i.e. open/closed)	RISK MANAGEMENT UPDATE	
						date	detail

monitoring and evaluation



A plan is only useful if it works in practice. Monitoring and evaluation will help you assess this and gives you information to improve the programme or service in the future.

monitoring

Monitoring means checking at regular intervals on progress. This may involve:

- monitoring progress against your operational plans (including any specific project plans) and/or
- monitoring of the services you provide.

OPERATIONAL PLAN MONITORING

Monitoring your operational plans should be a part of the regular board or management committee meeting (generally monthly or quarterly).

SERVICES MONITORING

To be effective, services monitoring should be:

- regular
- systematic
- planned
- purposeful and meaningful
- structured into the way the group is managed.

The type of services monitoring data to collect may include:

- client numbers (by age, gender, ethnicity, income level, referral source etc)
- problems/issues being addressed (or not addressed)
- results of interventions
- level of unmet need (e.g. waiting lists).

It is also useful to monitor trends in relation to overall service demand or provision, for example:

- changing consumer/client group
- changes in the wider community
- changes in inter-agency working
- impact of any particular local events on the services.

Regular, systematic monitoring provides information that can inform planning and provide a reliable basis for service evaluation.

evaluation

WHAT IS IT?

Evaluation is a more formal process to help you find out:

- whether the project or programme being evaluated is working as planned
- the impact that your group/project or programme is making.

Evaluation is an essential phase in the planning cycle and will provide you with information to improve the programme.

Evaluation involves the systematic collection and analysis of data needed to make decisions. It is an essential aspect of good decision-making. It helps establish the appropriateness, effectiveness, efficiency and economy of a service, project or policy. Ideally evaluations are a process for learning about improving the quality, effectiveness and/or efficiency of proposed and existing services, projects and policies. In some instances evaluation processes are required to gain support from, and other accountability to, funders and other stakeholders.

(From *Evaluation Guide*, Christchurch City Council).

STARTING POINT FOR AN EVALUATION

Plan the evaluation as part of the overall planning for the project or programme. When you set the programme outcomes or objectives, ask yourself "how will we know whether we are meeting these outcomes/objectives?" This is the starting place for the evaluation.

✓ Evaluation checklist

During an evaluation of a service or programme, ask yourself:

- What did we set out to do? What did we expect as a result?
- What did we do?
- How did we do it?
- What resources did we use?
- What has happened as a result?
What was achieved?
- How did this match what we expected to achieve?
- What unexpected things happened?
- How successful has the programme/ service been?
- What can we learn from what happened?
- What changes (if any) do we want or need to make, and why?
- How will we do this?
- What would we do differently if we were starting again?

- planned and systematic
- include all relevant contributors
- acted upon.

TIP

Too often an evaluation finishes with the evaluation contractor's report that is used to impress potential funders, clients and other stakeholders. The next stage is to feed the results of the evaluation back into the planning cycle to improve the service.

ENSURING THE EVALUATION IS EFFECTIVE

To be effective, an evaluation must be:

- relevant
- "owned" by the participants (i.e. participants believe it to be a useful exercise)
- timely
- manageable in terms of:
 - scale
 - resources (personnel and cost)
 - process/method

where to go for more information



1. *We are Doing Well Aren't We*, the Department of Internal Affairs. Out of print but may be available in libraries.
2. *Building Social Policy Evaluation Capacity*, P Duignan, 2002, Social Policy Journal of New Zealand, Issue No 19, Ministry of Social Development, Wellington. See – www.msd.govt.nz/publications/journal/19-december-2002/19-pages179-194.html.
3. *Starting a New Programme: Is it Really Feasible and How Will We Fund it and Where Do We Go From Here?*, H Gottlieb, 2000. See – www.Help4Nonprofits.com.
4. *Te Wana Quality Programme*, Health Care Aotearoa. Two books of standards @ \$24.95 each. See – www.hca.org.nz.
5. www.ganttchart.com – This website explains and provides examples of GANTT charts.
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