

## Organizations: Planning & Financial Control



2nd Face-to-Face Part 1

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## Class Agenda

- Housekeeping
  - Assignments?
  - General questions/comments
- Planning: Long and Short-term
- Budgets what, why, how?
- Fund development strategies



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## Planning

He is the best man [or woman] who, when making his plans, fears and reflects on everything that can happen to him, but in the moment of action is bold.

Herodotus (c. 484–424 B.C)

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## What is Planning?

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- Analytical process
  - Assessment of future
  - Determination of desired objectives in context of future
  - Development of alternative courses of action to achieve objectives
  - Selection of course or courses of action among alternatives.

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## Planning

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- Where we are?
- Where we want to be?
- How to get there?

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## Drucker Says...

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Management has no choice but to anticipate the future, to attempt to mold it, and to balance short-range and long-range goals... The future will not just happen if one wishes hard enough. It requires decisions -- now. It imposes risk -- now. It requires action -- now. It demands allocation of resources, and above all of human resources -- now. It requires work -- now.

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## Where Are We? Needs Assessment

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- Clients/Customers/Users
- Staff
- Resources

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## Needs Assessment Tools

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- Surveys
- Interviews
- Standards
- Focus Groups
- Analysis of statistics, records
- Suggestion box
- Organizational documents

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## Where Do We Want to Be?

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- Vision
- Mission statement
- Strategic Plan

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## Vision Statement

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- Guiding image of success
- "Artist's rendering" of the achievement of your plan.
- Description in words that conjures up a similar picture for all.
- Is "hummable"

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## Visions

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- [iSchool](#)
- [Greater Austin Quality Council](#)
- [UT-Austin](#)

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## Mission Statement

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- What are the opportunities or needs for which we exist? (purpose)
- What are we going to do to address these needs? (business)
- What principles or beliefs guide our work? (values)

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## Mission Statement Should

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- Express organization's purpose
- Inspires support and commitment
- Is easy to understand and convincing
- Is jargon free
- Is short

• Janel Radtke (1998)

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## Strategic Vision and Mission for UTIC

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- Write (revise?) a vision statement
- Write (revise?) a mission statement

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