Organizations:
Planning & Financial Control

2nd Face-to-Face Part 1

Class Agenda

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

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)
What is Planning?

• 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.

Planning

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

Drucker Says…

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.
Where Are We?
Needs Assessment

- Clients/Customers/Users
- Staff
- Resources

Needs Assessment Tools

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

Where Do We Want to Be?

- Vision
- Mission statement
- Strategic Plan
Vision Statement

- 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"

Visions

- iSchool
- Greater Austin Quality Council
- UT-Austin

Mission Statement

- 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)
Mission Statement Should

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

Strategic Vision and Mission for UTIC

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