

Hints and tips for creating an operational plan for political finance oversight institutions

- Each of your teams should have an operational plan for the year, which should be closely aligned to your strategy and corporate plan.
- Different teams do very different kinds of work, and so it may not be preferable to ask everyone to use an identical template; some may even prefer to use different software (e.g. a dev team or a project delivery team). It's important that they can share their plans with others, but the most important thing is that they can use and review the plan easily within the team, throughout the year.
- Team leads, in particular, need to be communicated with regularly about planning activities. It's important to share a developing new strategy, and first draft corporate plans, with these key staff so that they have enough time and information to be able to plan their own team's work effectively.
- They should first have a great deal of input into the commitments made in the corporate plan, since they will need to turn these commitments into a deliverable set of activities and projects for the year.
- Once the corporate plan has reached a fairly advanced stage, you should encourage all team leads to work up an operational plan as early as possible.
- It's a good idea then to share those plans (at a meeting or by email) so that everyone can see each other's plans and timescales. This helps to avoid resource clashes and overlooked interdependencies – especially for pieces of work that require input from more than one team.
- Operational planning is also useful to inform budget planning for the following year. Operational plans should explain whether any additional funding is required, over and above staff salaries, for different activities and projects. This will make budgeting and budget profiling easier.
- For larger activities and all projects, it's important that team leaders understand any reporting or accountability arrangements that apply – in other words, that they know they may be dependent at times on oversight or decisions made by others. For example, a Programme Board, a Management Group or the Board itself. Regular oversight at formal meetings will need to be incorporated into the timeline for that work, so they will need to know if (for example) a particular group they need to report to meets on a monthly or quarterly basis. This needs to be factored into plans and timescales.
- Operational plans should include:
 - A month by month list of activities to be delivered
 - End-to-end timescales for each activity or project
 - Ownership of each piece of work within the team

- Interdependencies with other teams who are helping to deliver the work
- The budget (other than staff costs) for particular pieces of work
- Reporting arrangements where applicable.
- Team leaders should share and discuss their operational plans with their teams on a regular basis, highlighting the links between the team's work and the overall vision and strategy.
 - Individual's objectives should be linked to the team's operational plan, and therefore to the corporate plan and the overall strategy, so that they are aware of their own contribution to the vision.
 - For staff in support functions, this link may be indirect, but it's important for managers to explain that by supporting the organisation's infrastructure and systems they are enabling the delivery of the strategic vision.
- Any major changes to a team's operational plan in-year should be brought to the attention of a more senior manager, since this may impact on the delivery of the strategy. It may be that this triggers a prioritisation or resourcing discussion or a conversation with the Board.