

Planning is a Process
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Planning done well is more than an administrative task that results in a report to sit on a shelf. According to Carter McNamara, “Planning is setting the direction for something -- some system -- and then guiding the system to follow the direction.”ⁱ Reframing this definition, planning is not only the collaborative process of shaping the activities of an organization into a cohesive, defined path toward a desired outcome or goal; it is also the iterative process that creates the internal organizational infrastructure through which shared vision and commitment to the organization are marshaled, directed and guided.

Effective planning:

- Reflects organizational priorities
- Establishes the mechanism through which these priorities are expressed in the budget
- Defines the standards of performance against which progress toward the desired outcomes/goals will be measured
- Monitors and measures the results.

The key to an effective planning process is the internal procedures and practices that not only instigate but also sustain the conversation around individual, departmental and organizational assessment that supports continuous learning and improvement.

Planning is about action. More specifically, planning is about taking ownership of action. Since planning involves setting a direction and acting in ways that lead to it, the planning process embodies John Dewey’s concept of aim. According to Dewey, aim is “the acceptance of responsibility for the observations, anticipations, and arrangements required in carrying on a function.” He adds that, “An aim implies an orderly and ordered activity, one in which the order consists in the progressive completing of a process. ...an aim means foresight in advance of the end.”ⁱⁱ

We intentionally aim at many things. We plan trips. We plan parties. We plan meals. But, our futures do not seem to get the same deliberate attention. Not planning our personal futures means external circumstance will direct where we go. Not planning the future of our businesses leaves our investment to chance and events we could have otherwise influenced. Planning may be the difference between the success and failure of our business efforts.

So, what is the planning process?

Planning involves four cyclical phases.

1. Planning involves observation.

Using the classic SWOT analysis, planning involves identifying strengths, weaknesses, opportunities and threats through observation and assessment.

2. Planning involves anticipation.

In order to set short-term and long-term goals, planning involves anticipating future events and conditions and deciding which actions will be most effective in preparing for those conditions. (Anticipation is based, of course, on known present conditions not guessing or fortune-telling.)

3. Planning involves making arrangements.

Applicable synonyms for arrangements are preparations, provisions and measures because the process of planning involves:

- ✓ Defining the actions required to accomplish the goals
- ✓ Providing the necessary resources to accomplish the goals
- ✓ Defining the measures that establish how you will verify that those actions lead to where you intended to go.

An additional concept of Dewey – means and ends - captures the foundation of the final element of the planning cycle: assessment and evaluation. According to Dewey, the activities we engage in are the means to an end until they are achieved; then they become the end. In planning, every end becomes the means to reaching the next level – for moving forward and continuously improving. Though plans focus on the end, the planning process entails monitoring the means to the end (the defined activities), measuring progress until those actions reflect the desired end (completing the task according to the standards set) and repeating the process.

According to Alan Lakein, “Planning is bringing the future into the present so that you can do something about it now.”ⁱⁱⁱ But in the words of Peter Drucker, “There are plans that lead to action today and these are true plans, true strategic decisions. And there are plans that talk of action tomorrow – these are dreams, if not pretexts for non-thinking, non-planning, non-doing.”^{iv}

Planning does not end when the plan is written. This is just the beginning of the process.

ⁱ McNamara, C. (n.d.). Basic guidelines for successful planning process. In *Free Management Library*. Retrieved from http://www.managementhelp.org/plan_dec/gen_plan/gen_plan.htm

ⁱⁱ Dewey, J. (1916). *Democracy and education*. New York: The Free Press.

ⁱⁱⁱ Lakein, A. (n.d.) Thinkexist.com. Retrieved from

http://thinkexist.com/quotation/planning_is_bringing_the_future_into_the_present/194902.html

^{iv} Drucker, P. (1954). *The practice of management*. New York, NY: Harper Collins. Cited in Cardinal Newman schoolwide action plan. (n.d.). Retrieved from

http://www.cardinalnewman.org/s/206/images/editor_documents/Advancement/SchoolwideActionPlan.pdf.