

Planning

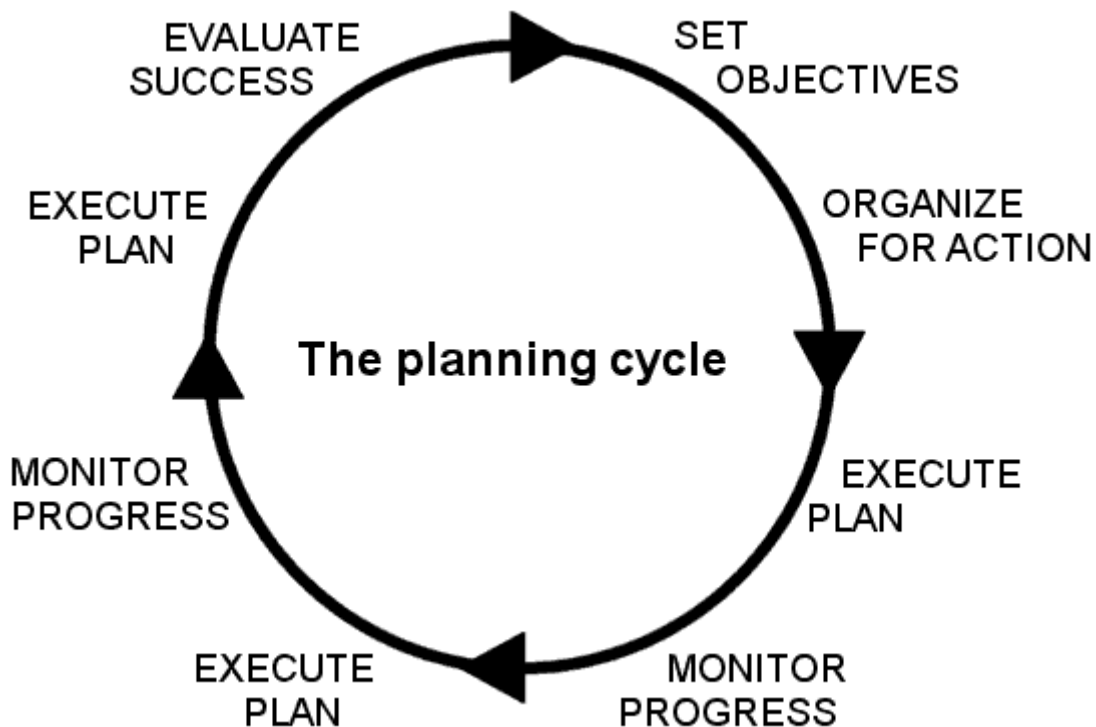
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Knowing where you're going and deciding how to get there

Belonging to CPF means that you subscribe to its vision, mission, and values and support its "object" or "purpose," which is "to promote and support educational opportunities for young Canadians to learn and use the French language."

What does that mean for your chapter? Why does your chapter exist: what are its long, medium, and short-term objectives? How are your members involved in establishing your objectives?

It is possible for just a few hard-working, dedicated members to effect important changes, but they must be organized, thorough, and patient.



Establishing Objectives

The Board of Directors needs to have a plan with clearly defined, realistic, and measurable objectives. These objectives will help the Board make difficult decisions and choices when planning and carrying out our chapter activities (when in doubt, refer back to your objectives). These objectives also allow the board to evaluate the success of activities and determine whether to undertake them again.

What are objectives?

Objectives are statements which define:

- ✓ what will be different?
- ✓ by when?
- ✓ how measured?

Objectives help you to make difficult decisions and choices when planning and carrying out your activities (when in doubt, refer back to your objective).

Objectives make it possible to evaluate the success of activities and determine whether to undertake them again.

Thinking in terms of objectives

Why are we having this meeting?
What do we want to accomplish?



time, place, agenda, speaker, room layout, displays, etc.

Who do we want to attract to the meeting?



types of advertising to be used



Who is this particular type of advertising meant to reach?



content, layout, style, graphics, etc.

What is each agenda item to accomplish?



amount of time allocated, method of presentation

What atmosphere do we wish to establish?



room layout, refreshments

What is this overhead meant to accomplish?



font, layout, colours, graphics

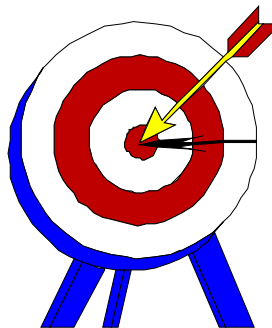


What message is the display meant to impart?



items, layout, pictures, symbols, handouts, etc.

... and so on ...



Setting Objectives

WHEN: prior to the beginning of the fiscal year

WHO: the members-not just the leaders, because:

- ✓ people will support what they help to create and will have more pride when the objectives are accomplished
- ✓ it's easier to get volunteers
- ✓ teamwork develops from the very beginning
- ✓ your members will understand why certain objectives have been established and why others were not



It's the role of the leaders to ensure:

1. that members have sufficient information on which to establish their priorities,
2. that there are objectives, and
3. that the steps are undertaken to achieve the objectives (that they're carried out).

WHERE: allow adequate resources (time, location, background information, etc.) to reach the objective of setting objectives

HOW:

1. What is the broad goal toward which you are working? (For example, "enhancing the core French program)
2. What obstacles are to be overcome? What opportunities can you take advantage of?
3. Gather information. Separate fact from assumption. Make a thorough appraisal.
4. The solutions may be obvious. If not, brainstorm and then prioritize solutions (see "*Brainstorming*" on page 5-5 and see "*Establishing priorities*" on page 5-6).
5. Write the solutions as objectives.

DON'T: expect your members to go to the effort of establishing objectives that are so specific as to limit your Board's ability to deploy resources and respond to opportunities and challenges.

(For example, it's helpful to have them establish an objective at the level of "to organize, during each school year, two after-school language/culture enrichment activities designed for core French students" but it would be too restrictive to have the members identify the objective, "to sponsor, each February, an activity for core French students in grades 4-6 featuring a Francophone entertainer.")

Now it's possible for the Board to develop an action plan (work plan) for each.

Brainstorming

Brainstorming is . . .

- ... a creative, imaginative process ...
- ... to generate new solutions,
- ... to re-evaluate old solutions.

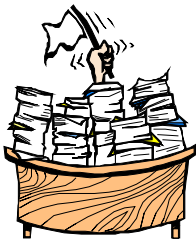


Principles:

- ✓ defer judgement
- quantity breeds quality

Rules:

- agree on the question
- everyone participates
- record all ideas as they come out
- say whatever comes to mind
- no judgements or evaluations (comments, asides, facial expressions, body language)
- no discussion, editorializing, or explanations
- every idea is acceptable-no matter how trivial, off-the-wall, or difficult it seems
- repetition is okay-piggybacking is encouraged
- silence is golden (don't quit until you're sure no more ideas will come forth)



Now that you have more suggestions than you can possibly handle...

1. Organize and consolidate the ideas
2. Discard the obviously irrelevant or unworkable (this might involve explanations and discussion).
3. Prioritize the good ones (see “*Establishing priorities*” on page 5-6).

Establishing priorities

Use a method of comparing everyone's ...
... opinions of the relative importance of the ideas

and

... willingness to actually work on the ideas.



Then establish your priority list taking both of the above into consideration.

Give me Five!

The following is just one of many processes to assist a group in setting objectives and establishing priorities. Others can be found in references in your library or through the CPF BC & YK resource library.

1. each person has a total of five votes to cast
2. they may allocate those votes as they wish: 1 to each of 5 ideas, 5 to one idea, 2 to one idea and 3 to another, etc.
3. go through the ideas one at a time, asking people to vote for each by raising from 1 to 5 fingers to indicate their opinion of its importance
4. write the total number of "importance" votes beside each idea
5. now tell everyone they have to vote again: according to their willingness to give some of their own time and energy to each idea
6. go through the same voting process, writing the total number of "effort" votes beside each idea in a different colour pen
7. now look for ideas with both high importance **and** high effort votes-those are your group's priorities
8. high importance / low effort ideas should be discussed by the group: is there another way to approach this idea? Someone else who might do it?
9. find a logical cutoff point that will give you about five to seven goals



3. give each participant five coloured dots (sticky on the back-available from your stationery store)
4. have them vote on the relative importance of each idea by placing the dots beside them on the flip  chart
5. now give each participant five dots of a different colour and have them  "vote" again according to their willingness to give some of their own time and energy to each idea
6. count the number of each colour of dots beside each idea

Writing an Objective

Whether you've had to brainstorm and prioritize or it was obvious from the beginning what needs to be done, you need to clearly define what is to happen. When writing an objective ensure that the statements define:

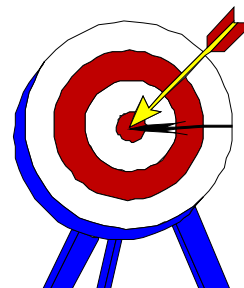
- what will be accomplished / changed / different?
- by when?
- how will we know / measure / evaluate?

Check:

- does it fit within CPF's purpose, vision, mission and values?
- does it start with the word "to"?
- does it indicate only one result?
- does it fit within your chapter's priorities, goals, policies, etc.?
- is it realistic and attainable?

Below is a list of well-defined, realistic and measurable objectives for a chapter:

- "to increase membership by 30% between April 1 and March 31"
- "to hold a kindergarten information night every spring with an attendance of at least 30 parents"
- "to have core French included as part of the curriculum for grades 4-6 by September of the following year"
- "to reduce attrition from our immersion program between grades 6 and 9 by 50% by September of 2 years hence"



Preparing your plan

Why develop an action plan?

An action plan or work plan ensures:

- you determine what resources you need (time, people, and materials as well as funding), and make plans to obtain them
- you're aware of all the deadlines, especially those which affect other parts of the plan
- everyone knows exactly who's doing what, to whom they report to, and who has the authority to make decisions or spend money



Work plans record vital information for reference by others as activities are carried out and—just as importantly—so that it is not lost as volunteers leave the organization. Work plans can also make future planning much easier, as they can simply be amended and improved as needed.

Action plans or work plans may be very simple and straight forward or can be very complex and multilayered, depending on the nature of the objective. A major, long-term objective might require several sub-objectives, each with its own work plan. In any case, your action plan needs to capture the above-noted information for reference by all of those involved.

Who develops the plan?

The development of an action plan is normally delegated to the volunteer or committee responsible for achieving the objective. The Board needs to make the volunteer or committee aware of:

- the resources allocated to the objective (money, materials, etc.)
- any limits on the authority of the volunteer or committee (for example, to raise funds, to make public statements)
- other relevant activities and/or deadlines which need to be taken into account¹ (see also www.cpf.bc.ca for upcoming branch and national dates and deadlines)
- interim and final reporting methods and deadlines
- relevant chapter policies.

In some cases the Board might wish to see and approve the draft plan before it is implemented. In all cases the Board oversees and monitors the activity through reports from the committee, its own financial reports, and so on.

1. see “Routine dates and deadlines” on page 5-10

Complex plans

Suggestions for preparing a complex plan:

1. use flip chart paper or static sheets to draw a calendar, with a large rectangle for each month
2. write in the dates you need to work around: statutory holidays, significant events (Stanley Cup playoffs, school board elections, Spring Break, etc.), reporting deadlines, your AGM, etc.²
3. identify the main steps in your plan, write them on post-it notes, and stick them onto the calendar when you think they will need to be done
4. now work backwards and forwards through your plan, inserting the intermediate steps on post-it notes as you think of them
5. pay close attention to timelines - things that need to be done before other things can happen - moving the notes around until you're satisfied you have a complete, workable schedule
6. remember to include intermediate checkpoints and reporting deadlines as well as evaluation and follow-up
7. transfer the steps and deadlines onto a work plan for use by everyone involved
8. prepare your budget³

2. see “*Routine dates and deadlines*” on page 5-10

3. see section 8 “*Chapter finances and fundraising*”

Routine dates and deadlines

A list of those important dates and deadlines which occur every year can be an extremely helpful planning tool for your Board of Directors and other chapter volunteers. This is very similar to the list of birthdays, anniversaries, and other annual family milestones that you refer to each January in order to enter them on your calendar and daytimer for the new year. Following is a list of key dates to get you started (routine branch and national activities which might influence your planning have also been included) and a checklist of additional dates and deadlines to include.

Your "cheat sheet" of routine dates and deadlines will be enhanced by noting, where appropriate, who (that is, what position) is always responsible for certain actions. This might be one of your officers (President, Vice President, Secretary, Treasurer) or a committee chair.

Once you have developed your "routine date/deadline list", one person (perhaps the chapter Secretary) should be assigned the responsibility of making changes as necessary. This individual should also ensure that every Board member and every relevant volunteer always has an up-to-date copy for his/her reference.

This list will then facilitate planning the specific dates and deadlines for chapter activities in a particular year. It will help you to look ahead, avoid scheduling conflicts, and ensure that important requirements are not forgotten.



When incorporating these items into your plans for the coming months, see the CPF-BC & Yukon website at www.cpf.bc.ca for specific dates for upcoming branch and national activities.

Branch and national dates and deadlines

April

- 1st - beginning of the CPF National and CPF-BC & Yukon fiscal years
- beginning - membership list e-mailed to the Chapter Representative
- late - membership rebates for February and March sent to the Chapter's bank account
- 30th - completed "Chapter Quarterly Summary Report of Volunteer Hours" form⁴
- 30th - deadline for submitting "Volunteer of the Quarter Nomination" form⁵

May

- during - national newsletter mailed
- late - summer branch newsletter mailed

June

- beginning - membership list e-mailed to the Chapter Representative
- late - membership rebates for April and May sent to the Chapter's bank account

July

- 30th - completed "Chapter Quarterly Summary Report of Volunteer Hours" form⁴
- 30th - deadline for submitting "Volunteer of the Quarter Nomination" form⁵

August

- beginning - membership list e-mailed to the Chapter Representative
- late - membership rebates for June and July sent to the Chapter's bank account

September

- beginning - fall branch newsletter mailed, contains the CPF-BC & Yukon AGM/conference information
- beginning - have a volunteer(s) review the online CPF Guide to French Immersion on the CPF National website www.cpf.ca and submit any corrections or new information to cpf@cpf.ca
- during - CPF-BC & Yukon AGM/conference information and registration forms circulated to the chapters
- during - resolutions to be included on the agenda for the upcoming branch AGM are circulated to the chapters⁶

4. see "Reporting requirements" on page 4-29 and see appendix F "CPF Forms"

5. see "Volunteer recognition" on page 7-12 and see appendix F "CPF Forms"

6. see "Resolutions and positions re issues" on page 10-6

October

- 1st - deadline to submit “Bouquet de Merci” nomination form⁷
- 1st - deadline for submitting J. Elmer Hynes Award for Leadership nominations⁷
- beginning - membership list e-mailed to the Chapter Representative
- during - national newsletter mailed
- 15th - completed Chapter Summary of Secondary Information submitted to CPF-BC & Yukon⁸
- 15th - completed Chapter Summary of Activities submitted to CPF-BC & Yukon⁸
- late - membership rebates for August and September sent to the Chapter Representative
- late - usual time of the CPF-BC & Yukon AGM and conference
- 30th - completed "Chapter Quarterly Summary Report of Volunteer Hours" form⁸
- 30th - deadline for submitting “Volunteer of the Quarter Nomination” form⁷

November

- late - winter branch newsletter mailed

December

- beginning - membership list e-mailed to the Chapter Representative
- late - membership rebates for October and November sent to the Chapter Representative

January

- early - deadline to submit draft resolutions to be considered for presentation at next fall's branch AGM⁹
- 30th - completed "Chapter Quarterly Summary Report of Volunteer Hours" form⁸
- 30th - deadline for submitting “Volunteer of the Quarter Nomination” form⁷

February

- beginning - membership list e-mailed to the Chapter Representative
- during - national newsletter mailed
- late - spring branch newsletter mailed
- late - membership rebates for December and January sent to the Chapter Representative

March

- 1st - deadline for submitting Socio-Cultural Grant applications for the coming school year
- 31st - end of the CPF national and CPF-BC & Yukon fiscal years

7. see “*Volunteer recognition*” on page 7-12 and see appendix F “*CPF Forms*”

8. see see “*Reporting requirements*” on page 4-29 and see appendix F “*CPF Forms*” or on the CPF-BC & Yukon website, www.cpf.bc.ca under *Chapter Information*

9. see see “*Resolutions and positions re issues*” on page 10-6

Chapter dates and deadlines

Insert the information under the month in which it takes place. Where applicable you should note the part of the month (early, middle, late, first week, etc.), but give specific dates only when they don't change. For some items it will also be helpful to include the title of the person responsible (President, Secretary, Chapter Contact, etc.).

Bylaw requirements

- when do you hold your Annual General Meeting?
- how far in advance of the AGM must you circulate the notice of the meeting? the report of the Nominations Committee? who is responsible?
- when do you prepare the reports to be presented to your AGM? who is responsible for each?
- when do you hold your Board of Directors meetings (note the minimum number required by your bylaws)? How far in advance of each must you circulate the notice of the meeting? who is responsible? How far in advance are individuals expected to contact the President to request time on the agenda? Do you circulate the agenda in advance? if so, who does that?
- anything else?

Reporting requirements

For more information see “*Reporting requirements*” on page 4-29.

- immediately after your AGM: submit the Chapter Board of Directors List and Chapter Banking Information forms¹⁰ to the branch (who is responsible?)
- note after your annual general meeting that if your chapter bylaws have been amended they must be submitted to the CPF-BC & Yukon office as soon as possible¹¹ (who is responsible?)
- any annual reports to outside agencies (e.g., if your chapter is incorporated, is a registered charity, received BC Gaming funds) (who is responsible?)
- socio-cultural grant evaluation reports is due within 30 days of the end of any events that the chapter has applied for socio-cultural grant funding
- anything else?

10. see see “*Reporting requirements*” on page 4-29 and see appendix F “*CPF Forms*” or on the CPF-BC & Yukon website, www.cpf.bc.ca under *Chapter Information*

11. see see appendix E “*How to amend bylaws*”

Key chapter management activities

- when is the beginning/end of your fiscal year?
- how soon after your AGM do you hold an orientation session for the new Directors? who is responsible?
- when does your Board appoint its standing committees for the coming year?
- are there regular reporting times for any standing committees?
- when do you review (and update as necessary) the mandates of your standing committees as well as relevant volunteer job descriptions?
- when do you review (and update as necessary) your chapter policies?
- anything else?

Regular and/or committed activities

List any annual activities to which your chapter has made a binding commitment as well as those that are so important they are highly likely to take place. The latter might include: kindergarten registration promotion, annual welcome to new French second language program parents, annual membership campaign, publication dates for your chapter newsletter, Concours d'art oratoire, French Film Festival, etc.

External dates

Last but certainly not least, you will want to include the timing of key activities of other organizations, such as spring break, school board meetings, and kindergarten registration. (Note: school board elections are held in mid-October every third year, the next being in 2006.)

Don't forget to insert statutory holidays for reference as well.

Committee dates and deadlines

In addition to the chapter's main list, each standing committee (e.g., Bylaws, Nominations, Membership, etc.) should have its own list of key dates and deadlines. These lists will be more detailed with regard to each committee's For example:

- when is each committee required to make its regular reports, recommendations, and/or proposals to the Board?
- what is the Nominations Committee's annual cycle of determining which board members will be stepping down and which staying, seeking potential candidates for upcoming vacancies, conducting interviews, etc.? when must it have the slate of nominees finalized?
- what is the Bylaws Committee's annual bylaws review cycle?
- what membership recruitment/retention activities take place regularly every year?

Partnerships

There is only so much that a CPF group can do! When we find ways to work with other parties which have goals that complement or are compatible with ours, we can often be far more effective¹².



Partnerships can help both/all parties to achieve their objectives by:

- ✓ enhancing credibility, influence, standing;
- ✓ expanding "reach" or "value";
- ✓ complementing areas of expertise and/or experience; and/or
- ✓ pooling financial, material, and/or human resources.

They can be highly formal, with legally-binding contracts (in which case your chapter should consult a lawyer), or relatively informal collaborations.

For the purposes of this discussion, a partnership is different from a "sponsorship." A sponsor donates part of the cost (in cash or in kind) of another party's activity in return for recognition and/or publicity. It is possible that another party might sponsor one of your activities and partner with your chapter in another endeavour.

Developing partnerships is different from "advocacy." Advocacy refers to the process of encouraging another party to make a particular choice or decision that you believe is right and justified. It is possible that your chapter might be advocating with another party to achieve one objective while partnering with that party to achieve another. It's also possible that some advocacy might be necessary first in order to work toward developing a partnership (for example, you might have to persuade your school district to be active within the community to raise awareness of French second language learning and then, once that decision has been made, you can seek to partner with the district to make those efforts even more effective).

In partnerships, both/all parties:

- retain their autonomy;
- make a meaningful contribution;
- have some responsibility for the outcomes;
- share in the risk taking and liability;
- receive some benefit.

Rarely are the types or levels of contributions, liabilities, and benefits exactly the same for both/all parties. However, there should be meaningful "sharing" in all of these areas for a true partnership to exist.

12. the information on this page is adapted from CPF's "*Partnerships and Collaborations Workshop*"

