**Managing for Success: POLC Template**

Use this template to accomplish the different phases of management and create an effective and efficient strategic and tactical plan. Complete all sections of the document that will help you think through the different tasks in management.

***Definitions:***

Plan: set goals and determine the best way to achieve them

Organize: allocate resources (people, equipment, money) to carry out your plan.

Lead: Provide focus for your team and motivate them to achieve the goals of your plan and hence that of the organization

Control: Compare actual to expected performance (people/project) and take corrective action when needed.

Name of the initiative/project:

Committee/Commission/Taskforce:

Description of initiative/project/Idea:

**Planning:**

What is the need for the project/initiative?

What value does it create for the customer/audience?

What are the core values and beliefs that are going to guide the behaviors of members involved in the project/initiative?

(fundamental belief of what is important. Example: Walmart- innovative thinking, leadership through service and commitment to saving people money)

Are there similar projects/initiatives that the organization has been involved in the past or currently? If yes, what are the key differentiators for the new initiative/project?

Conduct a **SWOT** analysis

|  |  |
| --- | --- |
| STRENGTHS | WEAKNESSES |
|  |  |
| OPPORTUNITIES | THREATS |
|  |  |

Set Goals and Objectives:

Example:

Overall Goal: To provide evidence towards effectiveness of community development of 2 projects initiated in 2015

*Objective 2:* Review and assess integrity and usefulness of all data collected since 2015.

*Objective 2:* Appoint a three-member assessment taskforce to lead all efforts related to this goal.

Develop a Tactical Plan:

For each of the goals along with its objectives identify people, time and resources needed. Divide your goals into phases of implementation and delivery if needed.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Goal** | **Objectives** | **People** | **Time** | **Resources** |
| Goal 1 | Obj 1 | Staff Manager, SMEs… | 3 months from start to implementation | IT support – online tools, platformBudget- for IT development, SME honoraria, staff time and allocation |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

List all identifiable risks, and tactics to manage them

**Organization:**

Organize your needs and resources based on tasks that need to be accomplished

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Objectives | Tasks | Team member | Department/Group | Functional area |
| Review and assess integrity and usefulness of all data collected since 2015. | Gain appropriate access and privileges to existing databases | Data Analyst, IT manager, Task force members | IT, Task Force, Committee | IT operations, EducationCommittee |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Establish a communication plan/protocol

**Directing:**

Assess the strengths and weaknesses of your team members.

Create a plan to manage and provide guidance for risks and threats that may arise.

Articulate a plan for communication, guidance and direction to be provided to the team (frequency, format, documentation)

Based on knowledge and application of leadership behaviors discussed, self- assess and create a list of action items for you as a leader to work on.

**Controlling:**

Set standards by which performance and success will be measured

Develop key performance indicators and metrics/tools for measurement. Create a plan for dissemination and data collection

List ways to address deviations from expected performance- Feedback and coaching, follow up and other ways to correct course.