
ANNUAL MANAGEMENT / OPERATIONAL PLAN POLICY & PROCEDURE

POLICY

The Annual Management/Operational Plan will translate the goals and objectives of the Strategic Plan into specific and realistic plans and targets for day-to-day management of the organisation in the year ahead.

Organisational performance will be regularly reviewed against the plans and targets in the Annual Plan and action initiated where necessary to help ensure that they are achieved.

PROCEDURE COORDINATOR

Chief Executive Officer

PROCEDURE & PURPOSE

a. Development of the Annual Management Plan

1. The College Manager/CEO and the Office Administration Manager establish a format and timetable for the creation of the Annual Plan, to follow the annual review of the Strategic Plan and assign responsibilities for preparing and collecting the information and materials required, and for developing draft proposals for inclusion in the Annual Plan.

The information and materials required will include:

- An analysis of performance to date against the existing Strategic Plan, and the Annual Management Plan and Budget for the current year,
 - Self-Assessment,
 - SWOT analysis, and..
 - Information on changes and trends in the market and in the financial, regulatory, and resourcing arrangements affecting the organisation in the year ahead.
2. The format, timetable, and allocation of responsibilities is circulated to all administration Staff required to participate in the planning process. (management team)
 3. The 'Management Team' meets to develop a draft Annual Management Plan covering all areas of the operation, including proposed timelines.
 4. The Accountant/Bookkeeper develops a draft Budget incorporating the proposals in the draft Annual Management Plan for review with the College Manager/CEO.
 5. The College Manager/CEO and the Office Manager review the draft Plan and Budget to ensure the Budget reflects the proposals in the Plan. Revisions to Plan and Budget are made where necessary.
 6. The draft Plan and Budget are reviewed by the Management Team and modified where necessary. The modified documents become the Preliminary Annual Plan and Preliminary Budget.

7. The College Manager/CEO circulates the Preliminary Annual Plan and Preliminary Budget to the Management Committee for its consideration and comment and presents it to a formal meeting of the Committee for its approval.
8. The Office Manager registers the final Annual Management Plan as a Controlled Document, with restricted access, and provides hard copies marked "Confidential" for the members of the Management Team, the Management Committee, and any others who need regular access to it.
9. Each member of the Management Team reviews the Annual Management Plan with those staff who report directly to them and develop, with them, individual Work Plans for the year ahead.

b. Review of the Annual Management Plan

The Annual Management Plan will be reviewed quarterly by the Management Team using up to date information on performance against the Plan.

If, as a result of the review, it is decided to make major changes to the Plan the College Manager/CEO will present the proposed changes to the Management Committee for approval. If approved, the changes will be incorporated in a Revised Annual Management Plan.

The Office Manager then advises the changes in the Revised Plan to all who need to know.

Members of the Management Team review the Individual Work Plans of those members of staff who report directly to them in conjunction with the quarterly review of the Annual Management Plan and agree on modifications where necessary.

Relevant Documentation

- Annual Budget
- Annual Plan
- Monthly Financial Statements
- Organisational Self-Assessment and Improvement Plan
- Continuous Improvement P & P's