

A GUIDE TO ANNUAL PLANNING

Annual Planning is a great way for us to ensure that our tamariki, families and Playcentres are having their needs met, always growing and developing, as well as being a Ministry requirement under the licensing criteria.

Each Playcentre should prepare an Annual Plan that guides the activities of the centre for the year, and considers not only the management of the centre, but also areas like curriculum planning, training levels, and communication.

Nationally we will have a basic annual plan that includes key items for the year, such as when RS7's are due in, when centres will receive bulk funding, AGM period, national hui, etc. We also have a Strategic Plan, developed by your representatives at national meetings, which should be guiding all centres in relation to our collective high level goals.

The Process

Whilst Annual Plans should be adopted at the AGM each year, along with a budget that will help support that plan, the process to develop the plan should begin in Term 2.

Centres should add in any key dates that are relevant for their centre - particularly think about those things that happen only once or twice a year.

The next step is to think about what are other key goals for your centre for the coming year - you could hold a brainstorming or planning meeting, you could make space on the wall, or in the kitchen for members to jot down their ideas and suggestions. Think about any maintenance or improvement projects that your centre is needing, funding levels, promotion of the centre, training levels, professional development.

By the end of Term 2 or very beginning of Term 3, you should have some ideas you can refine in centre meetings, and look at the practicalities - how will we achieve those goals, what are the steps, do we have the funding or other resources needed? Make sure that the plans you make are realistic.

Include details on the standard, every year activities too - who will make sure they happen, what resources do they need?

A draft Annual Plan and budget should be ready by the August centre meeting, for any final tweaks, or acceptance in principle. Then when you hold your AGM in late Sept-Oct, the plan can be approved and put into action. Your Centre Admin and Centre Support Workers should be given a copy as well that they will share with the Regional teams in case any support is needed. Don't forget to review your plan during the year to ensure you are progressing or addressing any roadblocks!

The Ministry of Education has a [sample Annual Plan here](#). We have also included some examples from centres of different sizes and different stages of centre growth. These are just food for thought to help you see different options of what could be included.

STEPS TO ANNUAL PLANNING

What is an annual plan?

The annual plan states the key objectives that the Centre wishes to achieve in the following year

Why have an annual plan?

- Fulfilled the goals and key objectives of the Centre
- Forward planning
- Keep the Centre focused
- Confirm the direction of the Centre
- Facilitate the financial planning

Who is responsible for developing the annual plan?

The whole Centre is responsible for developing the annual plan, it is the role of the Centre President to oversee that this is achieved, this is the same for the Centre Budget and the centre Treasurer.

Why involve ALL Centre Members in developing the annual plan?

- Playcentre is a co-operative
- Ownership by ALL
- Accountability
- Shares the workload
- The more people are involved in the process, the less likely that something significant will be omitted from the plan
- The more people are involved in the process, the more likely the expected outcomes of the plan will be achieved

How to involve ALL Centre Members in the annual planning?

- Ensure the opportunity for all Centre Members to input into the annual plan
- Incentives or social evenings to discuss over wine and cheese for example
- Hold the meetings at someones house rather than 'one more meeting at Playcentre'
- Organise a separate committee (say, main office holders) who work on the annual plan and circulate with the Centre for discussion

Note: All Centres work differently and what works for one Centre may not work for another. However, at some stage in the process, ALL Centre Members must be given the opportunity to input into the annual plan.

Guide to developing an annual plan

Step 1

Make a list of points made in the following documentation for suggestions, recommendations and requirements for improvements or goals –

- Review the past years annual plan, what hasn't been achieved?
- Review CSW Reports and the Centres internal reviews for suggested or recommended improvements
- Review findings from the Centre Playground Checks , Property Checks, Termly Health & Safety Checks for safety and building issues that need to be rectified
- Review the New Zealand Playcentre Federation Strategic plans to identify goals that can be achieved by the Centre e.g local promotion

Step 2

Determine where the Centre Members want the Centre to be 3-5 years from now. Have a new building? Have a new Playcentre? Have strong community links? High membership? Increased number of children transitioning to school?

You could do this by putting wish lists around the Centre for members to add to, discussion by members etc.

Step 3

Break down the results from Step 1 and 2 into goals and objectives for Centre into one year objectives. Remember to make goals and objectives achievable, it won't help having a 9 page annual plan when you don't achieve anything on it.

Example – Our Centre wants a new Playground:

Year 1 – Brainstorm what we want in our Playground and start fundraising. Liaise with the Regional Office about requirements

Year 2 – Gain plans and quotes, apply for grants, apply for consents

Year 3 – Start build

Step 4

Prepare an action plan from the one year objectives for the upcoming year. The action plan is a detailed plan explaining the what, who and how of meeting the key objectives. It includes tasks (what steps need to be taken to achieve key objectives), responsibility (who is responsible for performing these tasks), timeline (when these tasks will be carried out and deadlines for completion), resources (what resources, including financial resources, will be needed to complete these tasks) and performance indicators (how progress can be evaluated).

Suggested formats for an action plan

Suggestion 1

Key Objective: New Playground				
Tasks	Responsibility	Timeline	Resources/Budget	Performance Indicators
Brainstorm what we want in our Playground	Equipment to facilitate	Completed by end of Term 1	Big sheet of paper on the notice board	Everyone will have opportunity to input into what the new Playground will have
Fundraising	Fundraising Team	End of year		Termly teams will fundraise \$1000 each
Liaise with Regional Office	Equipment	Immediately		The Regional Office will support with advice and guidance

Suggestion 2

<p>1. Key Objective: New Playground Tasks: Brainstorm what we want in our Playground Liaise with the Regional Office Responsibility: Equipment and Fundraising teams Budget: \$x</p>
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Step 5

Prepare draft annual budget. This is the financial plan which shows the financial implications of the annual plan. See Guide to Budgets document.

Step 6

Ensure the opportunity for consultation with all members of the centre by:

- Circulate the draft annual plan and budget within Centre in preparation at the first meeting for discussion and make any changes as needed
- Bring to the second meeting for any feedback so that at your AGM, the annual plan and budget can be approved with no new information coming to the floor
- Approve draft annual plan and annual budget at the AGM