Module 5

Designing a Strategy

www.ecooptransition.eu

e-coop

Enabling communities to respond to
energy, social and environmental needs

Co-funded by the
Erasmus+ Programme
of the European Union

TABLE OF CONTENTS

Co-funded by the
Erasmus+ Programme
of the European Union

Enabling communities to respond to energy, social and environmental needs

PLANNING AND MANAGING

01

INTRODUCTION

In this module, we will delve into the essential aspects of planning and management. Specifically, we will explore objectives, priorities, action plans, and contingencies to equip you with valuable insights for success.

The Objectives Covered in This Module are:

- Learn how to set clear goals for your future endeavors that align with your vision
- Understand the importance of identifying priorities and creating strategic plans when developing a business idea
- Discover effective strategies for outlining actionable steps to achieve your objectives efficiently
- Equip yourself with the knowledge necessary to anticipate unforeseen circumstances and develop contingency plans on how to address them effectively.

Enabling communities to respond to energy, social and environmental needs

Setting long-, medium- and short-term goals

Making goals is something we all do, whether that be in our personal or business life. At the most basic level a 'goal' is a desire, objective or outcome you wish to achieve.

For example, losing a few post-Christmas pounds, running a marathon, increasing income. The trouble is, unless you write these objectives down and give yourself a timeframe and a methodology to achieve them, they are basically just desires/dreams.

Did you know that people with written goals are 50% more likely to achieve than people without goals?

Setting long-, medium- and short-term goals

To ensure our objectives and goals are effective, it is crucial to make them **SMART**:

Specific: Clarity is key. The more specific an objective, the easier it becomes to achieve. Vague or general goals can lead to confusion and inefficiency.

Measurable: It's important that objectives are measurable so that progress can be tracked effectively. This allows for adjustments along the way and helps determine if the goal has been met.

Achievable: Setting realistic targets ensures they are within reach based on available resources, skills, and timeframes. Attainable goals motivate individuals or teams by avoiding unnecessary frustration.

Realistic: While ambition is encouraged, grounding objectives in reality is essential for success. Being realistic means considering constraints while striving for significant but feasible outcomes.

Tangible: Objectives should be tangible enough to inspire action towards achieving them successfully. Making goals tangible helps in planning efforts systematically towards accomplishing milestones on the journey to success.

Setting long-, medium- and short-term goals

To effectively set goals, it's important to follow these steps:

List all the goals. Write down everything you want to achieve without worrying about making mistakes.

Categorise each goal. Once the list of goals is set, categorise them based on different aspects such as personal development, career growth, health and wellness, etc.

Set a deadline for each goal. Assign a realistic deadline to each goal to have a clear target date for achieving the expected results.

Schedule time in a diary. Allocate dedicated time slots in a schedule or in a diary specifically aimed at working towards accomplishing the set goals.

Identify obstacles **and plan** ahead. Anticipate potential obstacles that may hinder progress towards achieving the set objectives and proactively develop strategies to overcome them.

Setting long-, medium- and short-term goals

When strategising the goals, it's essential to categorise them into **short**, **medium**, and **long-term** goals for optimal planning and execution.

Short-Term Goals are targets that can be accomplished within a few months. They provide immediate wins and momentum for the team or individual.

Medium-Term Goals are designed to span several months up to five years for fulfillment, and are often influenced by achieving short-term milestones. They serve as stepping stones towards more significant accomplishments.
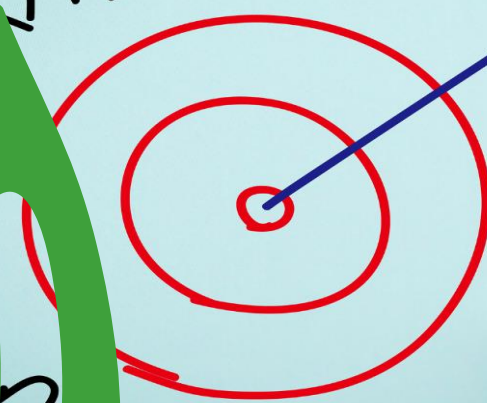
Long-Term Goals span 5 to 10 years for realization and require sustained effort and strategic vision. They represent the overarching aspirations that shape our future endeavors.

ACTION PLAN

02
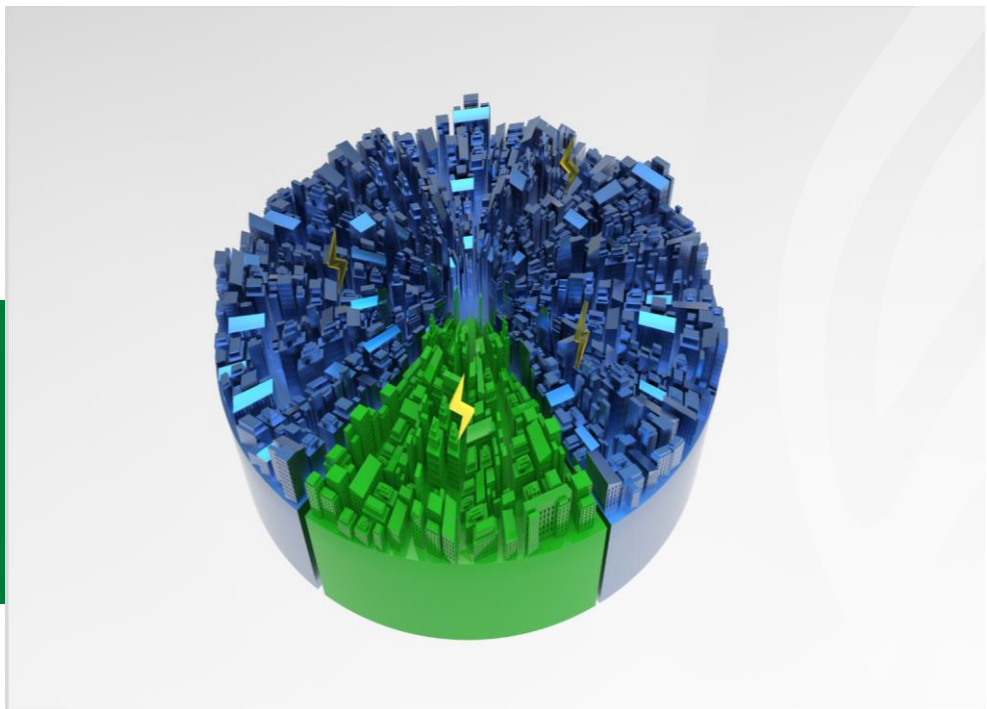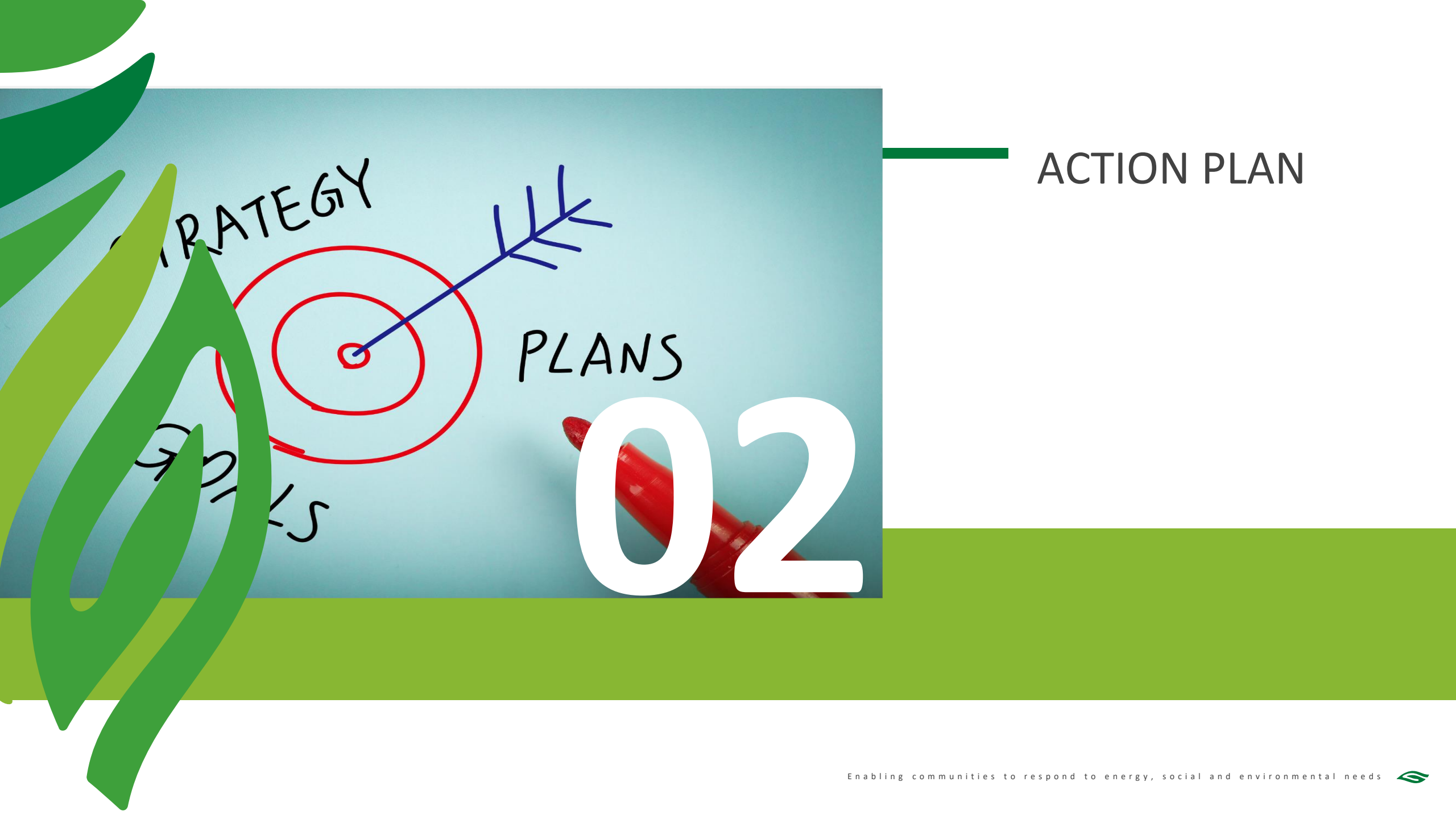
Defining priorities and action plans

Setting goals and priorities is just the beginning.

The next step is to create a well-thought-out **action plan** that will guide you towards achieving those milestones.

Once a clear vision of the desired accomplishments is established, it is essential to identify the specific outputs required to meet the operational objectives. Each objective should be linked with its intended purpose or outcome, along with the corresponding outputs necessary for success.

WHO

is going to do what – assigning the responsibilities and setting targets

WHEN

estimating the schedule and duration of activity

WHAT

In what order – determining the sequence and dependence of activities

HOW

defining human, technical and financial resources needed

WHAT FOR

identifying and selecting indicators that can be used to track progress and monitor the performance of the action.

UNFORESEEN CHANGES

03

Why planning for change matters?

- Change is an unavoidable part of any business or personal journey. By planning ahead, potential disruptions can be turned into opportunities for growth and improvement.

- Being proactive allows changes to be anticipated and prepared for, rather than reacting when they occur. This forward-thinking approach enhances productivity and minimises downtime.

- Adaptability enables the better meeting of evolving customer needs. Planning for change allows staying ahead of trends and providing superior service, which fosters customer loyalty and satisfaction.

- Planning for uncertainties helps develop strategies to reduce risks. By adjusting plans to account for various scenarios, businesses can be safeguarded and challenges navigated more effectively.

Enabling communities to respond to energy, social and environmental needs

How to embrace change and uncertainty

BE MORE FLEXIBLE

- For smaller, fast-paced projects, adopting an agile project management style can significantly enhance the ability to adapt to changes efficiently.

- Extra time should be allocated in the project timeline to accommodate unexpected challenges. This buffer can help manage unforeseen issues without derailing progress.

- Prioritising the development and implementation of the riskiest features at the beginning of the project reduces the likelihood of major disruptions later.

- Whenever possible, sticking to original deadlines is advisable. If changes are necessary, adjusting the project scope rather than extending timelines helps maintain momentum and ensures timely delivery.

How to embrace change and uncertainty

SPEAK WITH CONFIDENCE AND PROBABILITY ABOUT COMMITMENT DATES.

- To better manage timelines, a scheduling tool that accommodates ranged estimates should be utilised. This flexibility allows potential variations and uncertainties to be accounted for, providing a more accurate and adaptable project timeline.

- Historical data and predictive analytics should be leveraged to forecast finish dates with a higher degree of certainty. By analysing past project performance and current trends, more reliable projections can be offered.

- It is important to demonstrate to management how the project is designed to handle uncertainty and adapt to changes. Highlighting the strategies and tools in place that allow for dynamic planning and risk management ensures that the project remains on track despite unforeseen challenges.

UNCERTAINTY AND RISKS

04
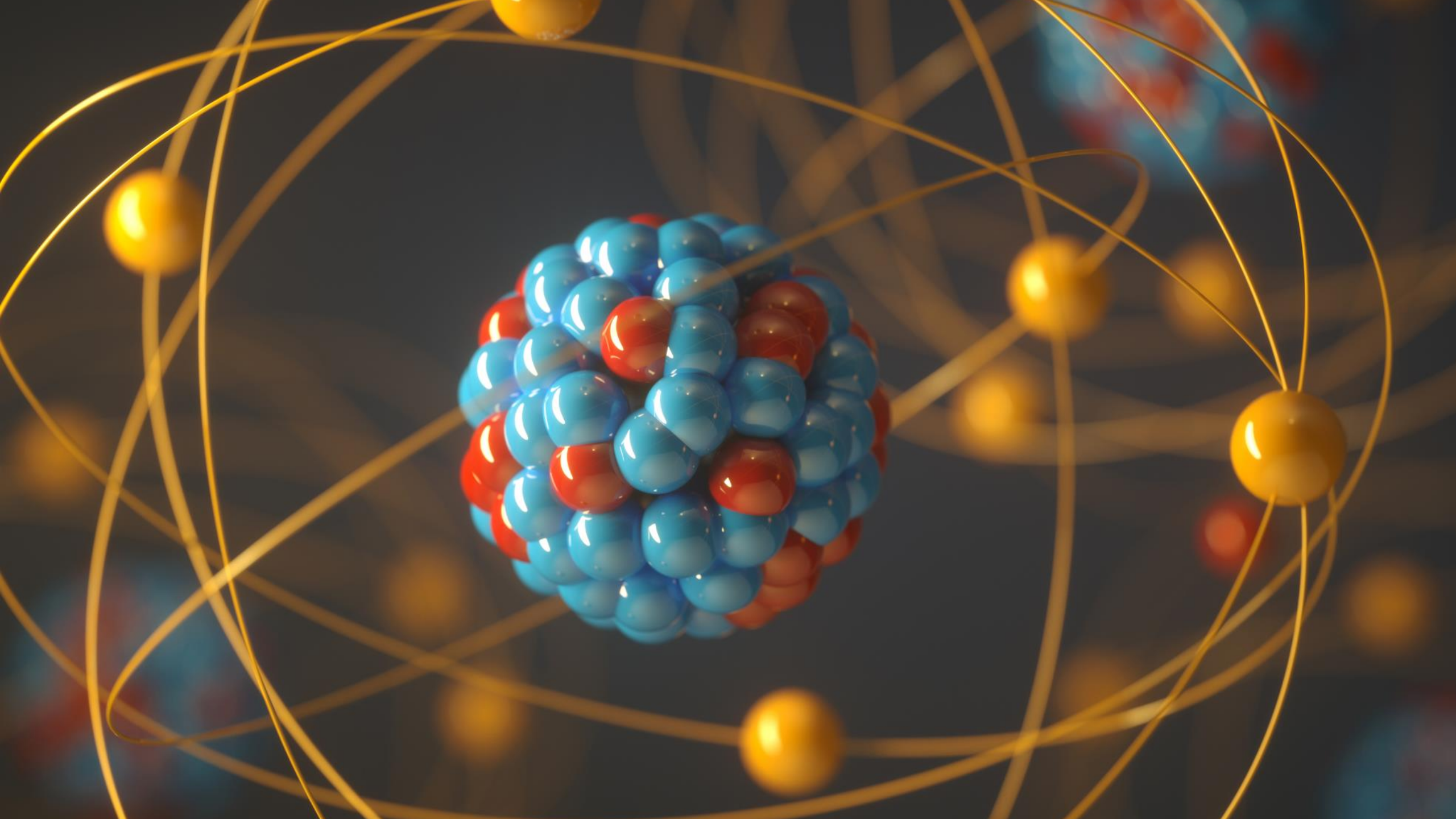
Uncertainty

Uncertainty is "any deviation from the unachievable ideal of completely deterministic knowledge of the relevant system"
(Walker et al., 2003)

TO SIMPLYFY

Uncertainty is the lack of knowledge of a certain outcome due to imperfect information

Risk

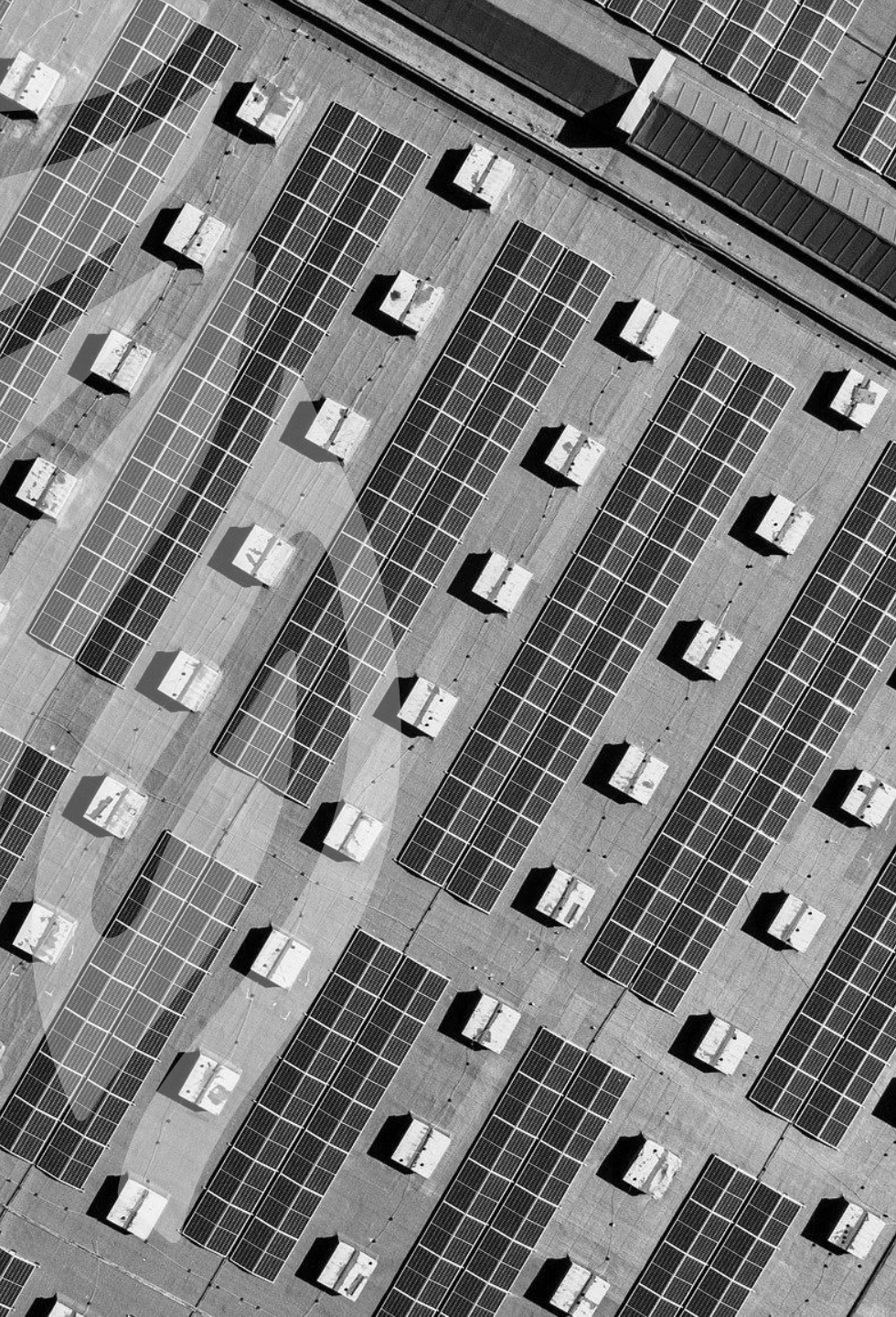Risk is "a measure of the probability and severity of adverse effects"
(Haimes, 2009)

RISK ≠ UNCERTAINTY

While facing uncertainty it is impossible to know the objective probability of each outcome …

… when facing risk we can measure the likelihood of each event to happen.

How to cope?

8 STEPS

1. • *Embrace uncertainty*
2. • *Manage stress and anxiety*
3. • *Generate confidence*
4. • *Focus on your goal*
5. • *Prepare (but just for what you can)*
6. • *Be flexible*
7. • *Take every opportunity to learn*
8. • *Look at failure as a step towards development*

GOOD PRACTICES

CSA Biohof Radl

Through the Community-Supported Agriculture (CSA) programme offered by Biohof Radl, members can "rent" a portion of land that the Radl family farms. Members contribute on a regular basis and receive weekly shares of the farm's harvest, which usually consists of a range of seasonal, organic vegetables. By providing educational materials, hosting community events, and including members in farm labour days, Biohof Radl actively cultivates a feeling of community and encourages involvement in the farm's operations.

https://uniag1.sharepoint.com/:p:/r/sites/e-COOP/_layouts/15/Doc2.aspx?action=edit&sourcedoc=%7B8ed78fbf-8a9a-40a6-b8eb-4f95ede55290%7D&wdOrigin=TEAMS-WEB.teamsSdk_ns.rwc&wdExp=TEAMS-TREATMENT&wdhostclicktime=1721032500245&web=1

Coole Eco Community

The Coole Eco Community is in the early stages of creating an eco-village and education centre on 38 acres in County Offaly, Ireland. They currently have four full-time residents and a strong network of regular visitors and supporters.

https://uniag1.sharepoint.com/:p:/r/sites/e-COOP/_layouts/15/Doc2.aspx?action=edit&sourcedoc=%7B8ed78fbf-8a9a-40a6-b8eb-4f95ede55290%7D&wdOrigin=TEAMS-WEB.teamsSdk_ns.rwc&wdExp=TEAMS-TREATMENT&wdhostclicktime=1721032500245&web=1

Enabling communities to respond to energy, social and environmental needs