

# Integrated Planning: An Overview of Approaches

## FOREWORD

Planning lets organisations build a picture of their future activity so as to meet their goals and objectives. It forces organisations to think about and decide upon their future actions. As part of the planning process, the organisation has to look at the future and adapt for social change and technological developments, seize opportunities, understand threats and dangers, and forecast the people, financial and physical resources it can call upon. In complex public service organisations, planning is consequentially complex. Goals and objectives may be simply expressed, but achieving them is not. If the planning process is not working well, then sub-optimal outcomes will result. The services to be delivered will be shaped by government policy. Policy initiatives bring new demands and more often than not a requirement to plan and thus demonstrate how the policy will be implemented and delivered. So the planning framework will need to accommodate specific statutory plans. There will also be a need to accommodate partnerships and co-ordinate with partners' planning arrangements. Integrating plans within a corporate planning process has become an even more Herculean task.

Achieving joined-up planning is as much about people, motivation and leadership as it is about techniques and processes. There will not be one right way of doing it, no golden rivet that puts every link in place. That said, improvement is needed in planning and in meshing together the many specific plans organisations prepare with the overall corporate plan.

In its World Class Financial Management paper,<sup>1</sup> the Audit Commission comments that "In many public sector bodies, the annual financial planning process is often only loosely connected to the strategic and service planning process".

So how can integration be achieved? Is there a checklist of how to get integrated planning right? What cultural dimensions need to be in place? What works best and why?

This guide examines how an integrated planning process can be approached and made to work better. The first part examines the overall process and includes a summary for senior management and board members as an aide-memoire about their part in setting the direction and deciding on alternative options when finalising the overall plan. The second part looks at elements of the cycle and suggests techniques and approaches for better planning outcomes. The third part looks at linking human resource management into the planning process. The final part examines working across traditional organisational boundaries.

On a practical note, to make improvements, new ways of working are needed. Some of the approaches and techniques described may be helpful, others less so, depending on where your organisation is now and any cultural dimensions that need addressing. Our approach in preparing this guide is to offer brief summaries of the techniques and approaches and links to where you can find more detail.

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1. *World Class Financial Management: A Discussion Paper*, Audit Commission, 2005.

Successful planning provides a focus for the future and clarity about purpose. It needs to work well.