



Planning

Under Supervision

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 - * Application of planning by the matron.
 - * Application of planning by the head nurse.
 - * Application of planning by the staff nurse.

Objectives

At the end of this lecture the post graduate student should be able to:

- Define planning
- Enumerate features of planning
- Identify importance of planning
- Explain planning process
- Explain element/level of planning (The planning hierarchy)
- Discuss types of planning
- Identify barriers of planning
- Describe difference between planning and decision making
- List application of planning by the staff nurse.
- Enumerate application of planning by the head nurse.
- Describe application of planning by the matron.

Planning

Introduction:

The planning phase of the management process is the most critical and precedes all other management function without adequate planning the management fails. Planning may be defined as deciding in advance what to do who is to do it and how when, and where it is to be done, planning is important it focuses attention on the objectives of the organization good planning assist the manager by establishing a means of control.

Concept of Planning:

Planning is a rational action mixed with a little of forethought. It is seen everywhere. In a business, planning is the primary of all managerial functions as it involves deciding of future course of action. Thus, planning logically precedes the execution of all managerial functions. Planning is the process of deciding in advance what is to be done, where, how and by whom it is to be done.

Thus, it is basically a process of „thinking before doing“. All these elements speak about the futurity of an action.

Or

It is determining the long and short term objectives of the institution or unit and the actions that must be taken to achieve these objectives. It requires decision making.

FEATURES OF PLANNING

- planning is goal-oriented
- planning is primary function
- planning is all-pervasive
- planning is mental exercise
- planning is continuous-process
- planning involves decision making
- planning is forward looking
- planning is flexible
- Planning is an integrated process
- Planning includes efficiency and effectiveness dimension

Importance of Planning

(a) Minimizes uncertainty: The future is generally uncertain and things are likely to change with the passage of time. Planning helps in minimizing the uncertainties of the future as it anticipates future events.

(b) Emphasis on objectives: The first step in planning is to fix the objectives. When the objectives are clearly fixed, the execution of plans will be facilitated towards these objectives.

(c) Promotes coordination: Planning helps to promote the coordinated effort on account of pre-determined goals.

(d) Facilitates control: Planning and control are inseparable in the sense that unplanned actions cannot be controlled. Control is nothing but making sure that activities conform to the plans.

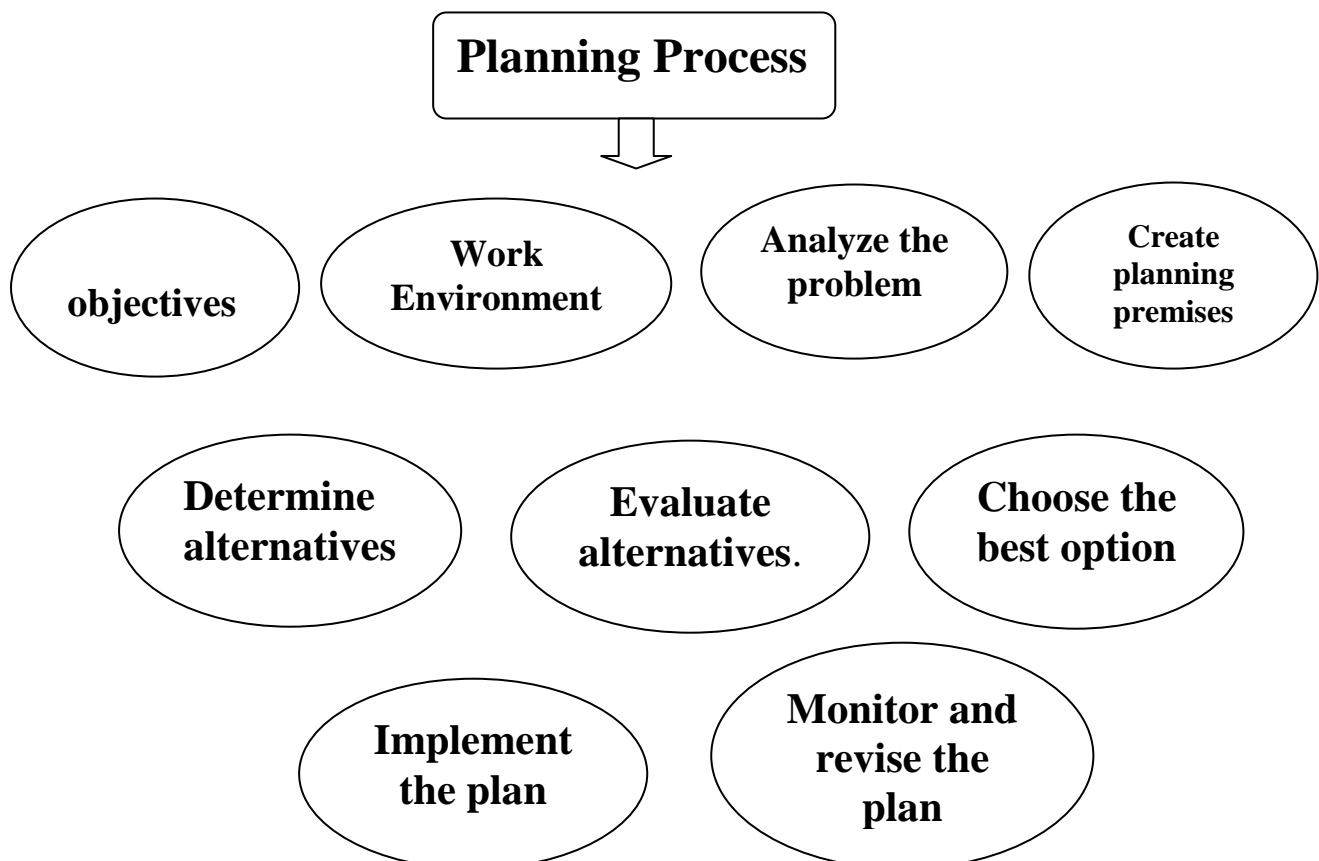
(e) Improves competitive strength: Planning enables an enterprise to discover new opportunities, which give it a competitive edge.

(f) Economical operation: Since planning involves a lot of mental exercise, it helps in proper utilization of resources and elimination of unnecessary activities. This, in turn, leads to economy in operation.

(g) Encourages innovation: Planning is basically the deciding function of management. Many new ideas come to the mind of a manager when he is planning. This creates an innovative and foresighted attitude among the managers.

(h) Tackling complexities of modern business: With modern business becoming more and more complex, planning helps in getting a clear idea about what is to be done, when it is to be done, where it is to be done and how it is to be done.

Planning Process:



١- **Establish objectives.**

Ascertain the present situation or problem; find out the needs or the problem.

٢- **Organize the work.**

Decide what needs to be done, identify the activities needed and select the planning team. Draw up a schedule of activities and outputs. Ensure that everyone who may be effected by the plan.

٣- **Analyze the problem.**

Through identify the cause of the problem and analyze their causes and identify constraints to change.

٤- **Create planning premises.**

Identify and design the requirement that might achieve goals of the plan, present these options for public discussion .

٥- **Determine alternatives.**

Set alternative solutions to the problem according to environmental, social and economic impact.

٦- **Evaluate alternatives.** For each solution.

٧- **Choose the best option.**

Hold public and executive discussions of the viable options and their consequences.

٨- **Implement the plan.**

Either directly within the planning process or more likely

As a separate development project, put the plan into action, the planning team should work in conjunction with the implementing agencies.

9- **Monitor and revise the plan**

Monitor the progress of the plan towards its goals, modify or revise the plan in the light of experience.

Hierarch of Planning:



Mission: Is a brief statement identifying the reason that an organization exist and its future aim of function and reinforce the organization's responsibility

Mission Statement:

- Should be brief and easy to understand
- Explain the basic needs that you fulfill
- Express the core values of the organization

Philosophy: Is a set of values and beliefs that guide all actions of organization and explanation to nursing administration and

nursing practices with in the organization the nurse managers and nurse practitioner's state their beliefs as to how the purpose or mission will be achieved.

Goals: Describe future expected outcomes or states. They provide programmatic direction. They focus on end rather than means.

Goals Are:

- 1- Broad in scope.
- 2- Directly relates to mission statement
- 3- Covers long time period e.g. 10 years

Objectives:

- Are clear, realistic, specific, measurable, and time limited, statement of action which when completed will move towards goal achievement. Objectives tell how to meet a goal.
- Objectives identify what you can do to define your success that will be faster, better or cheaper. Objectives identify priority initiatives that mobilize the stately.
- A well worded objective is (SMART) specific, Measurable Attainable / Achievable, Realistic and time bound

Objectives are:

- 1) Narrow in scope.
- 2) Indirectly relates to mission statement.
- 3) Cover short time period e.g. 1 year budget cycle.

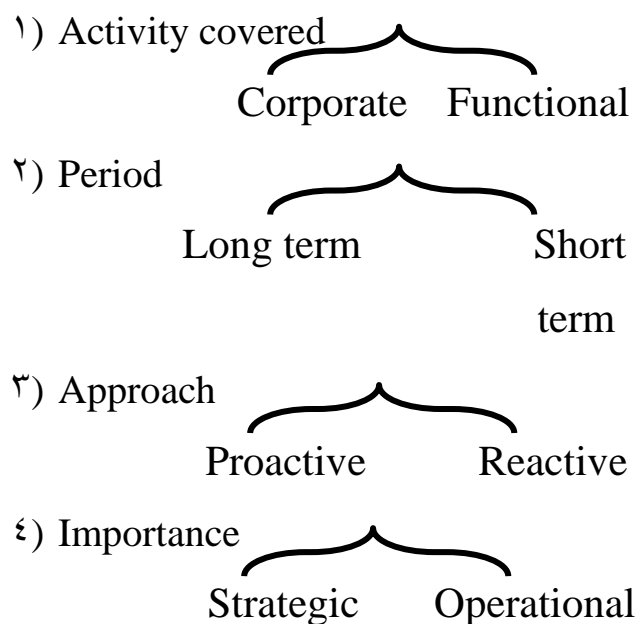
Policies: are comprehensive statement derived from the organization philosophy, goals and objectives that explain how goals will be met and guide for general course and cope of activities in an organization.

Procedure: identify the process of steps to be taken to implement a policy.

Rules: Define specific action or no action allowing no discretion.

Types of Planning:

Planning has several dimensions: these dimensions are



1) Activities covered

a- **Corporate planning:** Determines long term objectives of organization

- Generate plans to achieve these objectives
- Future oriented - integrated

- b- **Functional planning** – segmental
 - Derived from corporate planning
 - Under taken for sub functions within each major function.

२) Time Period:

A) **Long term planning:** strategic in involves generally ३-० years involves analysis of environmental factors.

B) **Short term planning:** Operational in nature, involves १ month-1 year aimed at sustaining organization in it production and distribution of current products end or services to existing market.

३) Approach:

a) **Proactive planning** designing suitable course of action in anticipation of likely changes in relevant environment to take decisions in advance.

b) **Reactive planning** organization response comes after environmental changes have taken place.

- Useful for fairly stable environment over along term period of time

४) Importance of contents:

a. **Strategic planning:** is a long term planning that set long term direction of organization which is wants to proceed in future, period of time ३-० years.

b. **Operational planning:** Tactical short term plan (time period १ year.

Barriers to planning:

- 1) A lack of knowledge and skill exists on the manager regarding how to plan.
- 2) Unclear objective
- 3) The manager lacks an understanding of the organization and its subunits leading to reactive rather than proactive planning.
- 4) Health care has traditionally been reactive or delivered in response to a problem.
- 5) The manager has an inadequate awareness of the external environment and thus does not involve competitors, regulatory agencies and the general public.
- 6) There is inadequate support from others in the organization.
- 7) Planning activities include too much or not enough detail.
- 8) Plan is used to control rather than to lead.

Difference between planning and decision-making:

- Decision-making is the part of the planning process.
- Decision-making involves choosing among the various alternatives.
- It is the process of identifying problems and opportunities and then resolving them.

Role of the nurse manager in planning

Application of planning by the matron:-

١. Develop the philosophy, objectives, policies and standards for the nursing services and the nursing care of patients.
٢. Draw the roster for nursing supervisors in the hospital.
٣. Determine the number of staff nurses needed to provide nursing care in all the shifts.
٤. Plan for educational programs for staff nurses.
٥. Determine time she needs for the overall daily activities e.g. nursing rounds. Medical director's rounds and meeting.

Application of planning by the head nurse:-

١. Assign each staff nurse according to the level of her competency.
٢. Check nursing care plan for the professional nurses.
٣. Design the nursing care plan for the non professional nurses.
٤. Determine the time for the routine activities.
٥. Determine the equipment which will be needed in the time of emergency.
٦. Determine the equipment which will be needed for the whole nursing unit.

- ∨. Determine the time for nursing round.
- ∧. Determine the time for participation in the medical round.
- ∩. Determine the time for nursing conference.

Application of planning by the staff nurse:-

- ∪. Draw a nursing care plan for each patient.
- ∩. Develop a daily time plan for her work during the whole shift.
- ∫. Determine the time which will be need for rendering nursing care to each patient.
- ε. Determine the time for the accomplish of her special duties.
- ο. Determine the equipment which will be needed.
- ϒ. Determine the time or providing and updating the plan.

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