

pragmatic planning

"A very helpful and informative day. It gave me a framework for revisiting or creating a new strategic plan and objectives and acting on them."

Carolyn Bailey, Chief Executive, Autism West Midlands

"The course delivery was tight and well time managed. I was very pleased with the swift delivery. It covered lots of ground."

Zoe Crick, Development Manager, Soho Theatre

"An extremely informative workshop. It was well presented and well timed, with plenty of food for thought."

Charles Barlow, Warwickshire Rural Community Council

A one-day workshop with David Saint on how to develop an inspiring, achievable and fundable strategic plan.

Tuesday 11th May

10am - 4pm

CCLA, 80 Cheapside, London EC2V 6DZ

'Pragmatic planning' is a practical one-day workshop for third sector leaders on how to plan in the real world – a world in which resources are tight, options can appear limited and there are always a thousand other more pressing day-to-day things to do.



This is a highly practical and interactive workshop, limited to thirty participants. It is led by David Saint, the Chairman of Action Planning, who has helped the Boards of many third sector organisations to chart a new way forward, and to develop realistic plans for making their visions a reality.

David is one of the UK's leading exponents of strategic planning, fundraising strategy, and the interdependency of these two disciplines. He will explain how to run a planning process which your team will find liberating, challenging, stimulating and insight-provoking.

Above all, he will help you adopt a pragmatic and effective approach which addresses the real constraints facing your organisation. David will equip you to develop a realistic plan which will truly inform and co-ordinate the work of your team and which your funders will find inspirational and truly credible.

We would like to thank CCLA for supporting these masterclasses, which are held in their Boardroom at 80 Cheapside, London EC2V 6DZ. CCLA manages cash and long term investments for more than 40,000 organisations of all sizes.

action
planning 
let's start from here

strategy and fundraising consultants

REGISTRATION FORM

You can book in three ways:

1. Enter your details online at www.actionplanning.co.uk/pragmaticplanning (you will then have a choice of either requesting an invoice, or paying online)
2. or fax this form to 020 8770 2090
3. or post this form to **Action Planning**, Waymark House, 19 Cedar Road, Sutton, Surrey SM2 5DA Tel: 020 8642 4122

Please register the following delegates (**BLOCK CAPITALS PLEASE**)

1 Mr/Mrs/Miss/Dr: _____ First Name: _____
Last Name: _____
Position: _____
E-mail: _____

Mr/Mrs/Miss/Dr: _____ First Name: _____
Last Name: _____
Position: _____
E-mail: _____

2 Name of Charity/Organisation: _____
Address: _____
Postcode: _____
Tel: _____

3 Please indicate here any special needs or dietary requirements:

4 Please tick appropriate box:

I enclose my cheque for _____ (payable to Action Planning)
Attendance fee: £192 per delegate, including VAT, lunch and all presentation materials.

Please register me/us and send me a VAT invoice. (Unless you specify otherwise, the invoice will be made out to your organisation).

I wish to pay by credit card (complete details below)

Visa Mastercard Switch/Maestro Delta

Card Number _____

Valid from _____ Expiry Date _____

Issue No. _____ Security Code _____
Switch/Maestro users only This is the 3 or 4 digit code on the back of your card

5 Please tick the relevant box if you would like a free discussion with Action Planning about our services in any of the following fields:

Major Donor Fundraising Research (e.g. into major donors or trusts) Revenue Fundraising
 Recruitment Strategic Consultancy Market Research
 Capital Fundraising Wealth Screening to identify potential major donors
(Please write below how much you need to raise and for what purpose)

DATA PROTECTION

We would like to retain your address to send you invitations to future events and information on our work. Should you not wish to receive such communications, please tick here.

We would like to include your name, title and organisation (but not your address) on the delegate list. Should you not wish us to do this, please tick here.

CANCELLATION AND REFUND POLICY

All delegate fees must be paid in advance of the conference. Your fee is fully refundable, provided you cancel in writing more than seven working days before the conference. No refunds are available for cancellations within seven working days of the event, though substitutions can be made at any time.

PROGRAMME

Action Planning reserves the right to vary the published programme of speakers and the timing of the sessions.

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A one-day workshop with David Saint on how to develop an inspiring, achievable and fundable strategic plan.

Tuesday 11th May
CCLA, 80 Cheapside, London, EC2V 6DZ

Attendance fee: £192 per person including VAT, presentation materials and lunch.

Pragmatic Planning

Pragmatic Planning is a practical, one-day workshop for those responsible for leading the strategic planning process, including chief executives, chairs, and directors of finance, fundraising and strategy.

It will help you develop a flexible and pragmatic approach to the challenge of strategic planning within the constraints of the third sector. Our aim is to make planning an inspiring process, which colleagues find enjoyable and motivating, and to create plans which are both practical in nature and truly achievable. The workshop should also help you to finance the future by developing plans which funders will find credible.

The programme will unpack the key elements in a strategic plan and the interrelation with fundraising strategy. It will also explain how to:

- engage your board, staff, funders and other key stakeholders in the planning process
- develop an inspiring vision and mission
- think 'out of the box' to identify new strategic options
- find time to plan, despite the pressures of day-to-day management
- ensure the process affects what people do every day
- measure progress and outcomes
- adapt the plan to accommodate the unexpected

The workshop is limited to thirty places, allocated on a 'first come, first served' basis.

Action Planning

Action Planning is a leading UK consultancy to the not-for-profit sector. It offers an unparalleled combination of fundraising and strategic consultancy, research, recruitment and 'hands on' fundraising to help organisations grow their income and fund major capital projects.

An initial discussion with Action Planning is without commitment. Please tick section 5 opposite or contact Freddie McGrath (fmcgrath@actionplanning.co.uk or 020 8642 4122) if you would like to talk to us about your needs.