



**POOR SERVANTS OF DIVINE PROVIDENCE
- General Management -**

Guidelines for the preparation of a

Management plan in Calabrian Organization



*«Which of you, wishing to
construct a tower,
does not first sit down
and calculate the cost
to see if there is enough
for its completion?».*

(Lc 14,28)

For an Opera of disciples-brothers-missionaries

**Calabrian Management: Subsidy 02
Verona, 2016**

Calabrian Organization - Form 02/2016
Guidelines for the preparation of a
management plan in Calabrian organization

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POOR SERVANTS OF DIVINE PROVIDENCE

General Management

Guidelines for the preparation of a

MANAGEMENT PLAN IN CALABRIAN ORGANIZATION

Calabrian Management: Subsidy 02



*Fr. Calabria and Fr. Pedrollo look “beyond”
during the construction of the terrace of S. Zeno in Monte.*

FOREWORD

«First providence is the head on the shoulder».

(St John Calabria)

Dear Brothers,

The management plan is a valuable tool in every missionary activity of the Church and the Opera.

Always it is in tune with the indications of the XI General Chapter of the Poor Servants of Divine Providence on the collegial management methodology inspired by the spirit of the Opera, we present the booklet ***"Guidelines for the preparation of the management plan of Calabrian Organization"***.

With this second guideline, the General Council offers to the Delegations and Missions some essential elements in the exercise of Planning, Programming and Control by a management plan as made mandatory by the General Chapter.

We are well aware that planning is essential for an organization like ours. In the Opera, to apply the Calabrian principle according to which *"The first providence is the head on the neck"*, we have to affirm that planning is needed to have a long-term prophetic vision in carrying out our charism.

In this handout, you will find some guidelines and technical elements of planning in a collegial management. At the same time, nevertheless, we do not run short of a reference to any activity that Fr. Calabria has given us. The insight Fr. Calabria

left us, and are essential to our Opera, such as “worry not”, by entrusting to God the Father is our distinctive characteristic.

The prophetic mission of our Charism is above all faith, trust and abandonment to Divine Providence. In our planning, there must be the vision of faith that supports our entire mission in abandonment to Providence. It will not fail if the first step in the realization of planning we did with faith and discernment aimed at understanding the will of God.

In planning, you need to have faith as to discover the signs of Providence that help us to achieve what we have planned. *"If the Lord does not build the house in vain do its builders toil."* This should be present in the planning and execution, and this reminds us that the first Providence are the people who plan and work in a collegial manner witnessing unity, participation and communion.

To all the Delegations and Missions, we ask to have faith and apply these principles, conscious that this is a way to bears witness to managing the mission and charism of the Opera.

Wishing everyone a good mission and a good planning, we greet you fraternally.

**Fr. Miguel Tofful
and the Brothers of the General Council**

INTRODUCTION

"Between the plan and realization acts the providence".

Our mission is to evangelize - says the XI General Chapter - that is, to proclaim with joy the good news of God's Paternity with the same passion with which Fr. Calabria had to proclaim of the Gospel. To evangelize means to build bridges and not walls - says Pope Francis - trying to get closer to the heart of the people and to translate in action, the culture of meeting in dialogue.

In this context, the Chapter members have identified the methodology of management as an objective to ensure that activities carried out by the Congregation are prophetic and evangelizing. Particularly the Final Document of the Chapter affirms that the Management methodology must contemplate the *planning and control*.¹

The objective of this document is to help the Delegations and Missions in the exercise of Planning, Programming and Control - PPC (Management Plan), as directed by the Chapter.

With this "*Handout no. 02: the Calabrian management*" we want to give, therefore, an input so that all the delegations, missions and activities can develop their own management plan with a collegial methodology, fraternal and responsive, to achieve a prophetic management within the current society that however is more inclined to individualism.

¹ Final Document of the 'XI General Chapter, *Witness in all the world*, 2014, p. 15 and 21.

We know that planning is not one and the same as to actualize. For this, after your planning, we ask God the Provident Father to help us to realize what we have planned. The Management Plan finalised in all activities has to be a tool of Providence to optimize resources and to accommodate more and better the people for whom the Calabrian activities are called to be Providence.

1. THE MANAGEMENT PLAN

Planning, Programming and Control in Calabrian Organization

"It is proposed that every house be authorized to define and regularly communicate its objectives in terms of activities, resources, staffs, relations with operators, evangelization"

(The Challenge of radicality, 2014)

The visits we made in the delegations and activities, as General Administration we asked all Calabrian activities to draw up a management plan. Many, at this request, suggested us to provide a guideline to explain the path to achieve this plan, so that there be a common guideline for all the Houses, delegations and missions. With this handout, we therefore wish to begin this process, proposing an orientation for the realization of the management plan of an activity, of a Delegation or Mission.

The Management Plan is a sequence of actions ordered in time in which the available resources are identified to achieve the objectives, and a control system is designed to ensure to achieve them. However, before going into the details of the management plan it is important to have a preliminary overview of the basics on which this plan will be built. This first part is devoted precisely to the essential principles.

For countless reasons, the present society and along with it also the organizations have become more complex. In managing a complex organization, with so many variables, planning has become an essential step if we are to achieve the objectives proposed by the mission.

In this regard, the XI General Chapter urges us "to implement the method of programming and verification" to place us on the path of a methodology for collective management. And the document "*The challenge of radicalism*" proposed by the lay collaborators and approved by the eleventh General Chapter asks us to proceed with the **Planning, Programming and Control - PPC** in all activities, this is also to say "*a way to get out of self-referring at times describes our homes and activities*".² Besides we highlight that this process to plan is a surer way in a participatory form to create in the activities a rapport of fraternity and solidarity.

Planning, Programming and Control is an essential administrative tool for any organization, whether public, private or religious. However, in religious organizations the habit of planning is not prevalent. Planning means to propose the goals and verify them, propose targets for activity and verify them periodically. A management without plan is like a sailor without a compass: it can get lost or go off in undesirable tracks.

Planning is the main sign for a management to be professional and not unplanned. Moreover, an organization without planning is not in a position even to suggest the possibility of participation to its members and that management is not collegial. On the other hand, the organization is supportive if only it proposes the participation of the people involved. Then an organization that wants to be participatory and inclusive cannot fail its planning.

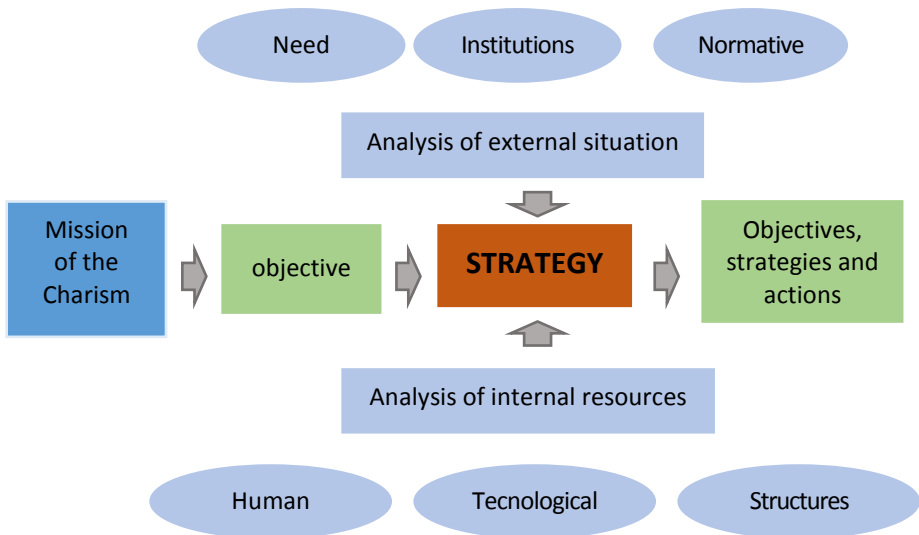
² Doc. The challenge of radicality, 2014, p. 16.

Any human activity done without some homework, is an arbitrary activity. Often this leads the individual and organizations to unforeseen ends, highly emotional and, in general, the individual and organizations plunges into situations worse than those existed. We can say that, in the Calabrian Organization, planning is a necessary procedure not to waste the Providence, and materials and human energy of the people working in our houses.

In this handout we consider the direction of the principle of strategic planning with which we set objectives and specify means, tools and actions to achieve them in the short and long term.

2. THE SYSTEMS OF PLANNING, PROGRAMING AND CONTROL (PCC)

The drawing below gives us the opportunity to understand all the necessary procedures to do planning of the activities we are called upon to manage. This chapter we shall expound each step of that figure, to promote a consistent and standardized approach to plan our activities.



2.1 DEFINITION OF MISSION, VISION AND VALUES



The First thing we have to do in the process of planning is to define the mission, vision and values at the basis of our activity.

This step should be considered very carefully, because we are in a multi-cultural society where you can take different paths with the risk that the management procedures remain in shadow or are even ignored. The antidote to this risk is given exactly with a clear definition of the mission, vision and values of the organization for which we do planning. These elements enable us to see things more clearly and allow us to work using all the energy in the right collegial direction.

Seeing the importance, we suggest that the definition of the mission, vision and value of organization must be done in a shared teamwork.

a) The Mission

The Mission, of the organization for which we make a management plan, is a statement of intent; by this, the organization will be inspired to set one's own goals and, subsequently, the actual procedures to be adopted with particular attention to one's own charism. The Mission is the charism in action, it is the charism of the Opera however realized in action. In this sense, it is essential to study the sources of the charism but must not be read with the intent to do restoration works, returning to do the same things that were done at the time of the founder.

The initial Mission of the Opera must be studied not as the end, but as a starting point to define the mission of the current time. The planning should start with the definition of the current Mission of the organization we want to plan.

EXAMPLE OF THE DEFINITION OF MISSION

IN THE GENERAL ADMINISTRATION:

- Mission: promote a model of prophetic management, collegial and innovative, animated by Calabrian spirituality, through technical and spiritual formation of the people, establishment of councils of management and the systematic use of planning, programing and control.

It is essential that the Mission activity is updated regularly, because even if the charism does not change, the social and historical questions change. The Mission is the way one has to go to realise the Vision and helps to define the resources that has to be used to get to there.

b) Vision of the Future

The expression "Vision", in the management of organizations, is used to indicate the projection of a scenario that the Administrator or the Governing Board of an activity want to "see" in the future and that reflects its values, ideals and general aspirations. The saintly founders were people with great vision of the future of their activities. For example, St. John Calabria saw the Hospital of Negrar, even when it was just an old age home, as a "Citadel of Charity"; also he saw the Congregation as a beacon to light up the dark night of the world.

The future vision represents a dream, but a very existent dream. Thanks to the "vision" of the future of so many people today, the world is full of innovation and initiatives to improve people's lives.

EXAMPLE AND DEFINITION OF VISION

IN THE GENERAL ADMINISTRATION:

- Vision: To be an Opera of disciples - brothers - missionaries who promote communion, participation and family spirit in the relations between people in the service of the poor.

The Vision has to be made obvious and shared with all the level of the organization. The future vision drives all the people working in the activity to dream as they hope to find the organization in future.

c) Values

The values of an organization are those for which it exists and works are fundamental for the achievement of its objectives. Eventually, they are the values that guide organisations. If everyone in the organisation has the same set of values and give equal priority, it is easier to work in a team, in a collective way, by pursuing the shared goals with the best capability.

EXAMPLE AND DEFINITION OF **VALUES**

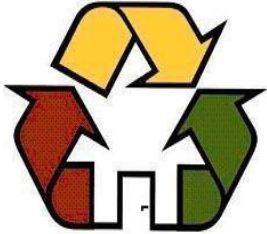
IN THE GENERAL ADMINISTRATION:

- Values: collegiality, acceptance of diversity, abandonment to the providence, gratuitousness, competence, renewal and solidarity.

The shared values give us energy, motivation, drive, enthusiasm and passion to all those who work in the organization, to reach the Mission and Vision through a common pathway.

The mission, vision, and values must be disclosed and understood by everyone who work in the Organization: executives, employees and consumers. For this reason, it is commended to place these elements in a place visible to everyone.

2.2 DEFINITIONS OF THE OBJECTIVES



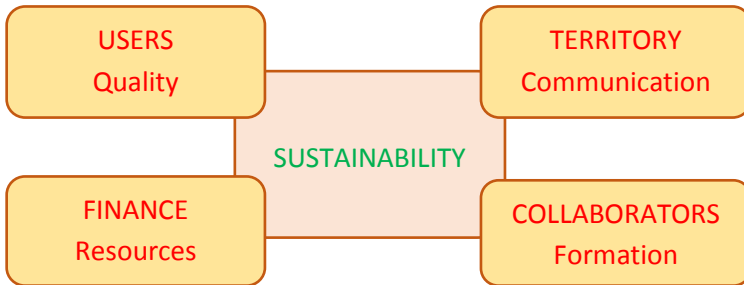
We have two types of objectives: the general purpose and specific objectives. The **overall aim** is a statement of intent and wishes formulated in broad and vague terms. When the overall objective is very broad, it is useful to split into additional sub-objectives.

The general objectives are to be followed by the specification of clearer objectives (**specific objectives**), which has to be practical in implementing, that is, to indicate what specific change is expected.

The formulation of the specific objectives is vital if we want to verify the effectiveness, efficiency and prophetic touch of action. Set targets means explain what you want to change, what do you wish to improve, defining who should take action and to what level.

To define the objectives one must explain in synthesis the following points: on what problem you intend to intervene; in what way does the problem occur; what are the causes of the problem; what is its' size (frequency, implication); why do you count it important to intervene; Who is already addressing the problem.

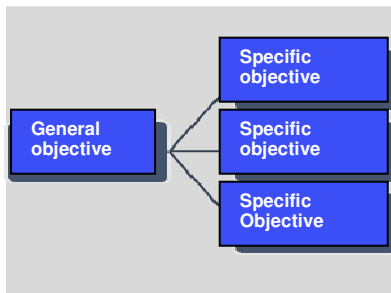
To define the objectives, primarily we have to consider the relations that exist within the organization between the four pillars of sustainable management:



- **Through communication with the territory, we have to construct contacts.** We need to formulate goals to address the relationship with the territory. Communicating with the social movements, churches, public and private organizations it is crucial for sustainable management. The organization is not an island.
- **With staffs a technical training and preparation for living the charism** is vital. The objectives should refer in the employment contracts, training and also to the participation of employees in decisions affecting the management.
- **The finances and assets,** as means to keep up the activity is another necessary point to consider when setting the objectives. You have to answer the questions: how we communicate with benefactors, how to present your needs of the activity. Where do we find means to keep the activity?
- **The users** are the reason for every Calabrian activities. It is necessary to define the objectives with regard to the service we provide **to users**. The internal procedures that brings quality of services, which we are called to offer to users.

Another important point for the management of Calabrian activity is that the definition of objectives to be shared, participated with teams and, where it is possible, also shared with the organizations that join hand with the activity we are planning. When we open the opportunity for people to participate in the planning and monitoring of the activity, we have confidence to give the right answers to the questions that the activity is called to respond.

2.3 ACTION PLAN



Action plan is the logical systemisation of the general and special objectives that is to be developed. For each sector, service or area the objectives must be made clear. And every sector, area and services should have its own general

and specific objectives. For every general objective, a plan with their specific objective must be elaborated.

As an example of the action plan, we present the definition of the general and specific objectives of an area of planning and managing made by the general administration with a reference to the triennium 2015-2017:

Area: Management with people

GENERAL OBJECTIVE	SPECIFIC OBJECTIVE	WHEN TO DO	WHO WILL DO	WHY TO DO
<i>Do management with the people(collaborators) connecting Principles of management and competence with the Calabrian Charism.</i>	Begin in the Delegations and Missions the handling of the management of people.	During the 2017	General Administration and every Delegation and Mission.	The contracts are made as per rules to form the collaborators both in the technical and spiritual level.
	Elaborate a manual of orientation and managing with the people in the Activities.	During the 2016	General Administration.	To motivate the directors in the application of management models with the people in the activity.
	Do formation courses on the topic "Management with the people".	During the 2017	Each Delegation and Mission.	To teach to apply the manual of management with the people.

HOW TO DO IT	FOR WHOM	WHAT IS THE COST	VERIFICATION
<p>Developing a manual to direct in the management with the collaborators. Forming the Directors in all levels to learn and apply the way of dealing with people.</p>	<p>For all the activities taking place in the Delegation and Mission.</p>	<p>Not defined cost.</p>	<p>Verify through the Delegation / Mission chart of verification that at least 80% of the activity should have this process in action.</p>
<p>Writing a manual that places in relation the managements of competences and the Calabrian Charism in that area regarding the rapport with personnel.</p>	<p>For all the activities taking place in the Delegation and Mission.</p>	<p>Cost of printing the manual.</p>	<p>Verify that by the end of 2016 the manual is printed.</p>
<p>Orienting the administration of the Delegations and missions in organizing the formation courses on the theme of management with the people, offered to all the directors of the activities.</p>	<p>For all the activities taking place in the Delegation and Mission.</p>	<p>Travel expenses, and residence expense of the participants. To include in a specific project.</p>	<p>Verify that in every Delegation and Mission a course be organized with this scope as priority.</p>

2.4 STRATEGY

“Bring about a collective management method inspired by the spirit of the Opera; it should consider the Boards of Directors with the participation of religious and laity. A real solidarity should be provided among the houses and a more agile and shared management style.”.

(Witnesses in all the earth, Final Document XI Chapter)



*Teamwork in an assembly of
“Calabrian Administrators”
of St. John Calabria Delegation.*

A strategy is a choice of logical and necessarily continual actions to apply a long term plan of action, thus to reach a goal that is aimed. The strategy is applied to every field in which the objective has to reach a set of separate operations are necessary, of which choice is not unique and outcome is uncertain.

To define a strategy we have to analyse the external situation of the organization / house: the needs of the territory, the institutions and norms. Besides it is necessary to analyse the internal resources, available in the organization/house: human, technological and structural resources. To have good strategy it is necessary to reach the objective. Often there are good objectives but the strategies are wrong and as a consequence not able to materialize what is planned.

2.5 PLANNING WITH PARTICIPATION

“Participative management permits to realize an integral planning of the similar, which is never before essential solidarity in institutions, to adapt fast with the flexibility to the change, redefining the more important objectives to follow.”

(The challenge of radicality.)



*Teamwork in an assembly of
“Calabrian Administrators”
of the Delegation N.S. Aparecida.*

Participation, in the social doctrine of the Catholic Church, is seen as a consequence of subsidiarity. In the compendium of the social doctrine, we read that: *“participation is a duty to exercise with awareness by all, in a responsible way and in the vision of common good”*.³ In this way, participation in planning and choice of objectives is an indicator of the fact that the activity becomes part of an organization born of a charism.

Planning is never so essential like today. All the more planning of the institutions born out of a charism demands a different reply from a planning of an industry that works in a private sector, or a government organism that works in the public sector.

³ Compendio della Dottrina Sociale della Chiesa Cattolica, n° 185 a 189.

Planning in a Calabrian organization must be participative. In the process of elaboration and planning the internal public and external public must participate. The collaborators, beneficiaries, institutions of the territory all must involve in the elaboration of the objectives. Participation as affirmed in the previous hand out no.01 of the Calabria management, is one of the process that differentiate us from other organizations that are not supportive in the fraternal sense.

2.6 BUDGET

Budget is the financial design of the organization. A budget is proposed to make on the necessity of the activity and not on the expected income. The fact of making a budget starting from the necessity of the activity leads us to see the real needs we have.

To make a budget it is important that the history of precedent financial situation of the activity, with the income and expense. The history of past budget helps us to understand what is necessary to improve to balance the finance in the forthcoming years. Budgeting has the necessity to consider even what is necessary from the institution in future. The budget is made every year.

The financial aspect cannot remain out of the planning. Getting used to reason on the cost of an action or an objective means to bring the finance inside the social rapport. To bring finance in the social rapport means to return the economy in a team spirit dimension. When the community or the council discuss the financial aspects of an activity / organization means the individuals rule over the finance. The opposite

happens when the finance remain outside the life of the community, probably it ends up to command the decision on a community.

We present here below a model chart of a budget.

EXPENSES	PAST EXPENSES	BUDGET		
	2015 (31.12.2015)	2016	2017	2018
Utilities				
Extraordinary maintenance of property.				
Salary expenses				
Legal consultancy and notary etc, ...				
Insurances.				
Travel and conveyance.				
Office running expenses.				
Passive interest and other bank expenses.				
Interest to private individuals.				
Other expenses				
Tax and fees				
TOTAL COST				
INCOME				
General Providence				
Projects				
Contribution				
Rent				
Salary received				
Other income				
TOTAL INCOME				
SURPLUS/SHORTAGE				

2.7 VERIFY AND IMPROVE CONSTANTLY IN THE MANAGEMENT



In the industrial world, to be efficient and effective, the organizations do certification. In the companies and business activity the managerial tradition, focus the attention on the certification of the efficiency and effectiveness of economic and financial.

Certainly, the theme is different for a Calabrian management. In fact, from one angle an activity that produces wealth is managed thus service is verified under the techno-economic aspect. And on the other side, however, since Calabrian activity is born of a charisma, and has a social and supportive function, there is a need to approach the traditional means to verify the social, relational, one's own value to be and to act.

After all the creation of a social capital, typical for an activity born out of a charisma, serve to improve the efficiency and action and reduce the probability of opportunistic behaviours, reducing thus the cost of practise of monitoring.⁴ In this way, the efficiency of an organization born out of a charisma, as our Calabrian Organization, air therefore to

⁴ GIUSEPPE ARGOLAS, *Valore dei Valori: La governance nell'impresa socialmente orientata*, Ed. Città Nuova, 2014, p. 194.

consider jointly the achievement of economic and financial result as result of the relational dynamics and with the values defined by the organizing Mission.

In the input of the lay co-workers for the XI Chapter, “the challenge of Radicality”, speaks the importance of an instrument of certification, affirming that *“the culture of verifying is an essential element to give credibility to the objectives proposed to us”*. It is to support a culture of certification, and is necessary that the organized mission the developed objectives in the act of planning must have a clear form. As much the mission and objectives are clear and concrete so much is easy that the *“co-workers feel involved in the activity increasing the sense of partnership to the Opera”*.

To verify in an orderly and sure manner it is essential to define and size with **other indicators**. It is basic to define the indicators to gauge if the chosen objectives in planning are achieved. Indicators are the parameters aimed at measuring the results in the dimension that one wants to observe, such as: revenue growth for the area or cost centre, satisfaction of employee or institutional environment and user happiness. We can verify by measuring.

Finally, completing the verification, it is necessary to plan again; thus the management of the activity enters in a virtuous cycle of steady improvement.

We suggest as a method for testing and re-planning the cycle called “PDCA”. The logical consequence of the four points

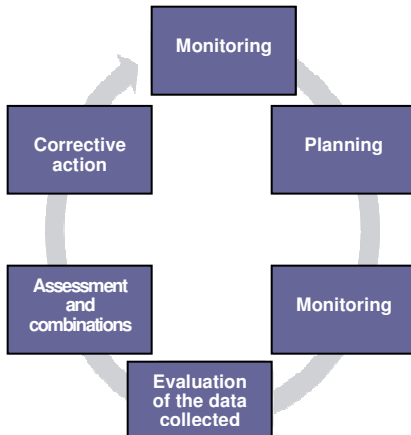


shown in the journey to assume to obtain a continuous and durable improvement in the activity we organise.

- **P** – *Plan*.
- **D** – *Do* = Application of the program, first of all in the cited situation.
- **C** – *Check* = Study collected from the grades of feedback.
- **A** – *Act* = Action to make definitive / or improve the process. Do better than last time. Need to schedule another time what is verified.

The checks made by this method is also used to promote a culture of quality that is aimed at continuous improvement of the procedures and optimum use of resource. The verification is part of a cycle that leads to plan what has been verified. As you can see, the verification is carried out only if the plan has been prepared with the objectives defined in a clear and concrete form.

3. SYNTHESIS OF THE PROCESS OF PLANNING, PROGRAMING AND CONTROL



The process of planning is not a static but an ongoing effort. The objectives could be the result of a procedure of planning or a control of what is planned.

Many managers do planning because it enters in the necessary fulfilment for the control of activity or because the general

administration of the Delegation demands.

Planning just to plan is useless, does not change anything in the way of management, and does not change the way the activity.

The Management Plan must be a continuous process of excellence and is useless if we leave them in the drawer:

The **planning process** has to be done regularly by the management of an activity, comprising the following steps: goal setting, planning, monitoring (with displays), evaluation of the data collected, assessment and combinations, corrective action and re-definition of the objectives.

4. PROCEDURE OF MANAGING PLAN

The managing plan is realized time to time by every Delegation and Mission and Calabrian activity, following the proposed model in this handout. The order of presenting the managing plan is the following:

1. Outer cover:

To specify the Delegation or Mission or activity for which it is made and planned.

2. Arrangement:

In the presentation we include the three features:

- Description of the method used to draw up the Management Plan
- Brief description of the history of the Delegation / activities for which the Plan is made
- Description of what we expect to achieve with this Management Plan

3. Mission, Vision e Values:

The Mission, Vision and the values are shown in clear and brief form.

4. Action plan:

In the action plan, the general objectives are added and in every sector the special, service or area is subdivided in the Delegation / Mission/Activity for which the plan is made. (see the examples proposed in pg. 22-23 of this handout).

5. The Budget:

The budget is inserted as per the model proposed in this handout (see pg. 27) or other similar model.

6. Conclusion of the plan:

In the conclusion it is worth describing which type of verification is thought of applying to control the realization of what is being projected in the managing plan.

CONCLUSION

As we saw above, the planning process, Planning Programming and Control (PPC), in Calabrian Organizations, is an important management tool to create fraternal and pleasant relationships within the activity. Planning is a management process and, if done as suggested in this handout we will be able to live the dimension of the spirit of family that is proper to our charism. Another dimension of the planning process is to help us make good use of the providence that God the Father has entrusted us in our houses to serve more people in a better way.

In the light of all this, do the Plan of Management of the Delegation, of each activity, is a duty of all those who have been called to serve the role as superiors, treasurer, president or directors. This is because the act of the planning, programming and control is the only way to reach a collegial management as specified by XI General Chapter. We can affirm that without planning there is no management today and without a good management we cannot serve well the people who come to our activities.

We want this handout no. 02, presented in summary form, may in fact be a tool that helps us to improve our ability to evangelize and a means because the management of our activities be a prophetic witness and an expression of the Calabrian charism.

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*«Take care of the souls.
This is our duty!
Take care of all the souls,
But in a special way
the poorest and the most forsaken.
They are the beloved of God ».*

(St. John Calabria)

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