Strategic Planning in CSO

Key concepts and techniques
Purpose of planning

• Achieve clarity for your ideas
• Understand what it takes to reach your goal
• Create a schedule of tasks
• Clearly communicate your goals and vision to others
• Distribute tasks and responsibilities
Planning vs. strategic planning

- “Planning” often refers to “operational planning” i.e. short term (up to 1 year)
- Describes steps to be taken to reach the goal
- Exercised at different levels of organization
- Clearly defines responsibilities and deadlines

- Strategic planning is a kind of planning that is more general
- Explains why and how organization exists
- Long- and mid-term (3, 5, 10 years or more)
- Usually done by an organization as a whole
- Not necessary to set deadlines and allocates tasks
Key components of strategic plan in any organization

- **Vision** – the visualization
  - What will the result be when our mission is completed?

- **Mission** – the change
  - What are we going to change in the world and why?

- **Values** – the core
  - What do we base our decisions on?
Do not overcomplicate

• There must be a congruence between scale of organization and exercised planning efforts
• Strategic planning is meant to help you perform better, not to cause confusion
• Trust your instincts about depth and complexity of strategic planning in your CSO
  • It’s not “obligatory” for all organizations to have a strategic plan
    • BUT it significantly increases capacity of the CSO
The essence of strategy is choosing **what not to do**

- Strategy is the path that takes us from where we are now to where we want to be
- Strategy should be based on identifying what the organization does better than anyone else, rather than trying to do everything well
- Failure to follow your strategy will prevent you from reaching your goals
  - However, strategy should be reviewed and amended according to the changing environment
Questions to identify your strategic focus

- What are we most deeply passionate about? What is the vision?
- What are the unique strengths of our organization? What do we do best compared to others? What is our ‘calling’?
- What drives us (human or financial)?
Key components for successful strategic planning

• **Knowing who you are**: vision, mission, values. Why do you exist?
• **Knowing what brings change**: be honest in understanding what really brings improvement. Avoid focusing too narrowly on activities and deadlines.
• **Predicting how the environment is likely to change**: use tools like PESTLE or SWOT estimate future changes.
• **Rigorous and honest self-appraisal**: what are the things you good at and what areas could use improvement?
A strategic plan should not simply be a ‘shopping list’ of things we want, rather it should document choices that the organization wants to make.
Organizing process of strategic planning

- **Factors to consider in the process:** situation, identity (personal and organizational values), desired changes.
  - This component is prepared before the planning process begins
- **Key stakeholders worth listening to:** NGO’s beneficiaries, staff, managers, donors, other NGOs and stakeholders of the organization
- **Dilemmas to address:** Once you have agreed on the final goal and existing environment, it’s time to make choices. Consider the following questions, as examples:
  - Do we focus or do we diversify our services?
  - Do we give a little help for many or more intensive support for a few?
- **Useful tools:** remember that you are not the first nor the last organization trying to accomplish strategic planning. A variety of tools were developed to help with this process
Five principles to consider in the process

• **Ensure leadership driving.** Someone must facilitate the process of strategic planning – usually a leader of the organization. (In some cases it’s best to entrust this task to an external facilitator).

• **Get staff ownership.** It’s vital to involve all members of an organization in the process of planning.

• **Listen and learn.** Collect opinions of beneficiaries, staff, other NGOs, etc.

• **Make hard choices** now to save trouble in the future.

• **Keep it as simple as possible.**
Self-reflection and constant learning are vital for organizational development
The 4MAT learning model

- Applied only to issues that involve you and your organization directly
- Fosters evolution of the organization and staff
- Still, only one of many approaches to organizational development.
4MAT cycle

- Acting means **direct implementation** of what was planned before. Or it can be a reaction to an unexpected event.
- Experiencing is what **you feel** or discover in the acting phase. The processes of acting and experiencing can happen simultaneously.
- Reflecting is when **you analyze** obtained experience and derive new knowledge from it.
- Conceptualizing is when **you apply** conclusions from the reflecting stage to improve what you do, i.e. activity.
Thank you!

Questions?