



Strategy Planning & Mapping

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MCVS – TRAINING WORKSHOP NOVEMBER 2013

What is strategic planning?

A strategy is an overall approach and plan. So, strategic planning is the overall planning that facilitates the good management of a process. Strategic planning takes you outside the day-to-day activities of your organisation or project. It provides you with the big picture of what you are doing and where you are going. Strategic planning gives you clarity about what you actually want to achieve and how to go about achieving it, rather than a plan of action for day-to-day operations.

What is strategic planning?

Strategic planning enables you to answer the following questions:

- Who are we?
- What capacity do we have/what can we do?
- What problems are we addressing?
- What difference do we want to make?
- Which critical issues must we respond to?
- Where should we allocate our resources?/what should our priorities be?

Planning for a strategic planning process

A strategic planning process is not something that can happen in an *ad hoc* way, at a regular planning meeting or during a staff meeting. It requires careful planning to set it up so that the process is thorough and comprehensive. When you develop or revise a strategic plan, you are setting the parameters for the work of your organisation, usually for two to three years or longer. So, it does make sense to spend some time and energy planning for your strategic planning process

Planning for a strategic planning process

TIMING

The questions to ask here are:

- When do you need to do a strategic planning process?
- How often do you need to do a strategic planning process?
- At what point in an organisational or project cycle do you need to do a strategic planning process?
- How long should a strategic planning process be?

WHO SHOULD BE INVOLVED?

The two key questions here are:

- Who should participate in the strategic planning process? and
- Who should facilitate the strategic planning process?

Who should attend?

The strategic planning process helps an organisation clarify, consolidate or establish its strategic framework. Embedded in the strategic framework are the values and vision of the organisation. Because of this, it is important to involve the whole organisation in at least part of the planning process.

INPUT

Because a strategic planning process looks at the big picture, it is useful to get external input into the process. It is easy for those of us who are involved in the work of the project or organisation to lose sight of the overall picture and to think about the issues from the point of view of our own work only. Getting someone in with a wider view and wider concerns may open doors to new ideas and ways of thinking. This helps to keep an organisation at the cutting edge of development work. The external input should make it clear what the opportunities, challenges and threats in your organisation's external context are.

PREPARATORY WORK

There are two important tasks that need to be done before a strategic planning process:

- A review of your organisation's work; and
- A review of your organisation's internal functioning.

SWAT analysis

Identify the organizations:

- Strengths
- Weaknesses
- Opportunities
- Threats

Defining the strategic framework

With the groundwork done, you are now ready to move to the “meat” of the strategic planning process. This is defining the strategic framework within which your organisation or project functions.

Defining the strategic framework

A strategic framework includes:

- A clearly stated **vision**;
- Clearly articulated **values**;
- A **mission**, articulated in a mission statement;
- The **overall goal** of the project or organisation;
- The **immediate objective** of the project or organisation;
- The **key result areas** on which the project or organization intends to focus;
- An understanding of the **gaps** between where an organisation or project is and where it needs to be to achieve its goals and objectives and of the forces that are likely to help and hinder it.

All these elements need to be in **alignment**

VALUES

Your **organisational values** are the shared values that underpin your work as an organisation and your relationships with users and other stakeholders. They are what you believe is the right way to do things and to deal with people, and what you believe about the way that, ideally, the world ought to be organised. Your organisational values will determine your strategies and your operational principles. If, for example, you have an organisational value that emphasises doing things *with* rather than *for* people, then you are likely to involve beneficiaries, or potential beneficiaries, closely in your planning process.

MISSION

You should now be in a position to express your organisation's mission in a mission statement. Your mission includes the particular way in which your organisation intends to make a contribution towards your vision.

A mission statement describes what the organisation does, with whom or for whom it does it, and, in broad terms, how it does it.

So, a mission statement will have four components:

- What the organisation or project is;
- What the organisation or project aims to do or achieve;
- Who the work is aimed at (the target group) and who it is done with;
- How it does its work – in broad terms, what methods it uses.

Mission Statement

Why is a mission statement important?

A mission statement is important because:

- It is an easy way to communicate to others what you do and how you do it;
- It helps you to clarify and focus your work.

OVERALL GOAL

Depending on what approach you are using, there are many different names for the different levels of goals and objectives.

- Your **overall goal** which we are defining as the accumulated benefits which beneficiaries will enjoy when the development work is successful; and
- Your **immediate objective** or the **project purpose** which describes the specific situation which the project or organisation hopes to bring about.

The overall goal is directly related to the significant problem you have identified in your problem analysis.

Immediate Objective

If the overall goal is directly related to the significant problems you have identified in your problem analysis, then your immediate objective is directly related to the causes of that problem.

KEY RESULT AREAS

Key result areas define the outputs that are needed to achieve the immediate objective of a project or organisation.

INTERNAL IMPLICATIONS

Now you can look at the internal implications of your strategic plan. One of the tools you could use here is a Gap Analysis. Once you have a strategic plan, you are in a position to:

- Structure the organisation appropriately
- Identify where specific change management will be required
- Identify potential problems
- Clarify where to next.

WHERE TO?

You have now completed the strategic planning part of your planning process. You have a framework within which to locate your activities but you still need to plan those activities or other form of meetings to gather all the needed information.

Mission Statements

Oxfam: To create lasting solutions to poverty, hunger, and social injustice. (10)

Best Friends Animal Society: A better world through kindness to animals. (7)

CARE: To serve individuals and families in the poorest communities in the world. (12)

The Nature Conservancy: To conserve the lands and waters on which all life depends. (11)

JDRF: To find a cure for diabetes and its complications through the support of research. (14)



good luck
is the
result of
good
planning

Thank you