



WHO SHOULD BE INVOLVED?

Who should be involved in a strategic planning process?

For a breakdown of who should be involved at different stages across the planning spectrum, look at the toolkit: Overview of Planning, in the section on Who Plans?

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. We suggest the following:

Strategic planning phase	Who should be involved?
Planning the process	The management team of the project or organisation.
Understanding the context	All staff and Board members. Administrative staff should be involved if it is important for them to understand the organisation's issues and problems.
Vision, values and mission discussion	All staff and Board members. It is very important to involve all staff, including administrative staff in this discussion as it is likely to provide a set of operating principles – in other words, to make it clear why people who work in the project or organisation are expected to work and behave in a certain way.
Review of strengths and weaknesses, opportunities and threats	Programme or professional staff for the whole of this process; include administrative staff in the discussions around internal strengths and weaknesses.
Discussion of strategic options and goals	Professional staff and Board members.
Organisational structure	The management team with input from the rest of the staff.

When administrative staff are very interested in the professional work, you may want to invite them to participate in all stages where professional staff are involved. Certainly senior administrative staff should be involved throughout. So, for example, if the organisation has an accountant, she should be involved throughout. But it is not necessary for the receptionist to come to all the sessions. However, once the strategic framework is in place, then all staff should be taken through this, with time to ask questions and get clarification, preferably in the smaller units or departments within which they work.

Who should be involved for strategic planning process.....

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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.

The review of the work

This can be done by:

- An extensive external evaluation before the strategic planning process in order to feed into it;
- A departmental/project/unit level analysis of the work done, including achievements against targets and indicators of impact (See also the toolkit: Overview of Planning, the section headed Tools 1: Structuring the Work Progress Analysis);
- A management team review of the work done across the organisation, including achievements against targets and indicators (see Glossary of Terms) of impact.

Even if you have an external review, it is useful if the teams have done some internal reflection as well.

The review of the internal functioning of the organisation

This can be done by:

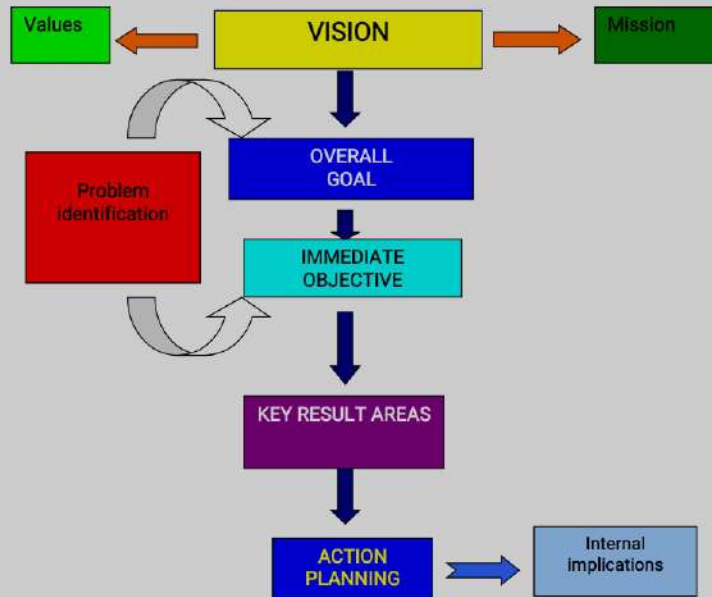
- An external review conducted by someone with an in-depth understanding of development and non-profit organisations, although not necessarily of your particular sector;
- A management review of the internal functioning of the organisation or project;
- Input from staff (see also the toolkit: Overview of Planning, the section headed Tools 1: Structuring the Work Progress Analysis).

These are not mutually exclusive – even with external input it is useful for teams to do some internal thinking and reflection.

In addition, it is useful to get all those who will be participating in the strategic planning process to do some preparatory work individually.

 Message


In a diagrammatic form, the process of defining the strategic planning framework looks like this:



VISION

What is an organisational or project vision?

Organisations and projects in the not-for-profit sector usually exist because they want to make a difference in society. They have a vision of how society could or should be in the future. This vision is not something they can achieve on their own. It is something that guides them in their work and which they believe can be achieved if enough projects and organisations share the vision and work towards it. An example of a vision might be:

We strive to contribute to a society where every citizen has equal access to quality health care and is able to live in an environment which supports quality health through access for all to clean water, healthy food and sanitary living conditions.

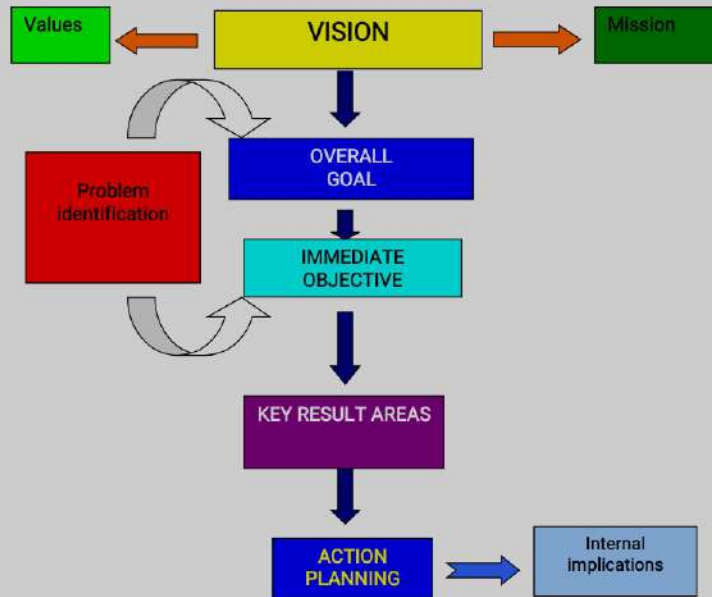
The particular organisation with this vision may be an organisation that trains and supports community health workers in rural villages. It believes that its work will contribute to this vision.

The vision is the starting point for any strategic framework. It shapes the framework and gives the organisation or project a basis on which to answer the following question:

Will this goal, objective or activity help us to make a contribution to our vision?

On the following page, you will find an exercise you could use to help you develop a vision statement for your project or organisation.

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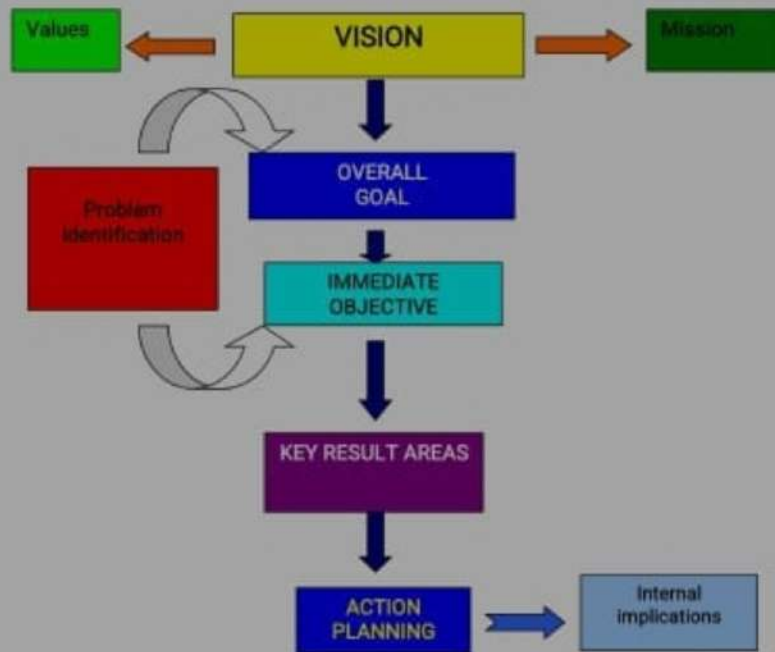
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Strategic Planning

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Strategic Planning

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 Basudha Jana Hgc...


... .. English and Bengali...

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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.

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?

Only once these questions are answered, is it possible to answer the following:

- What should our immediate objective be? (See the section on Immediate Objectives)
- How should we organise ourselves to achieve this objective? (See the section on Internal Implications)
- Who will do what when? (See the toolkit on Action Planning)

A strategic plan is not rigid. It does, however, give you parameters within which to work. That is why it is important to:

- Base your strategic planning process on a real understanding of the external environment (See the section on Input – discussion);
- Use work you have already done to extend your understanding of the external environment and of your own capacity, strengths and weaknesses (See the section on Review).

What is strategic planning?....1

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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.

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?

Some suggestions:

- You need a strategic planning process when the strategic framework within which your organisation or project functions needs to be developed, clarified, or consolidated. On the next page, you will find a questionnaire to help you decide whether or not your organisation or project needs to organise a strategic planning process.
- Don't do a strategic planning process more than once every two years unless the external or internal context has changed dramatically. Usually once in three years is enough. This does not exclude you from doing a strategic review more often, say once a year. A strategic review is quick - a day or less where you look at the strategic framework, against what is happening internally or externally, as a sort of reality check.
- There are various times in the life cycle of a project or organisation where it makes sense to do a strategic planning process. So, for example, when you are initiating a new project or new organisation, then you need to do a strategic planning process. If you have just had a major evaluation of the organisation or work, and this has led to challenging recommendations, then you may decide to have a strategic planning process immediately afterwards. When you reach the end of a major phase in a project, it makes sense to review progress and prepare for the next phase through a strategic planning process.
- It is not possible to do a thorough strategic planning process in fewer than three days. If you are not used to this sort of process, you will need at least four or five days.

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Message

