

Intro to Strategic Planning



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What is Strategic Planning?

- ❑ Disciplined effort to produce decisions and actions and shape what the organization is, what it does, and why it does it.
 - ❑ Helps the organization to focus its attention on its mission and to more effectively reach its objectives
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Who Should be Involved in Planning?

- Planning process advocate (ED, Board members, etc.)
 - Staff
 - Facilitators
 - Board
 - Other key stakeholders
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Key Organizational Components to Develop Before Planning Begins

- Checklist includes:
 - Does the organization have a mission statement?
 - Is it reflective of the current goals of the organization?
 - What are the key objectives?
 - What are the strategies to achieve the objective?
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Methods of Strategic Planning

There are a number of different approaches used to define strategic objectives. Some of the more well known include:

- Future Search
 - Open Space
 - SWOT
 - ZOPP/OOPP/LFA
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Logical Framework Approach (LFA):

The approach used in this plan is based on the Logical Framework Approach (LFA). This approach has been chosen because:

- ❑ It is systematic;
 - ❑ It was created to increase program design effectiveness;
 - ❑ It creates a transparent basis for the processes of planning and evaluation;
 - ❑ It enables effective participation in decision-making; and
 - ❑ Most donors like organizations to use this approach when they make requests for funding.
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LFA Steps

- ❑ Analysis of context
 - ❑ Analysis of stakeholders
 - ❑ Problem analysis/social assessment
 - ❑ Objectives analysis
 - ❑ Plan of resources/inputs
 - Includes personnel, financing, equipment, etc.
 - ❑ Indicators/Measurements
 - ❑ Risk Analysis
 - ❑ Analysis of Assumptions:
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Step One: Analysis of Context

- ❑ What environment is the organization operating in?
- ❑ What is the need for the organization?
- ❑ Are there others out there doing similar work?
- ❑ What are the political and social implications of the organization?



Step Two: Stakeholder Analysis

- Stakeholders are those who are influenced by and exert an influence on the things that take place in the project – directly or indirectly.
 - Stakeholders can be divided into four main groups:
 - * **Beneficiaries**
 - * **Decision-Makers**
 - * **Implementers**
 - * **Financiers**
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What is a Stakeholder Analysis?

- A technique to identify and assess the importance of key people, groups of people, or institutions that may significantly influence the success of your activity or project.**
 - It helps you to anticipate the kind of influence, positive or negative, these groups will have on your initiative and develop strategies to get the most effective support possible for your initiative and reduce any obstacles.**
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Stakeholder Matrix

Stakeholder	Stakeholder interest	Assessment of Impact	Potential Strategies

Step Three: Problem Analysis

The problem analysis should examine what the problem is and ultimately why the organization or program should exist

Basic Questions to Answer with a Problem Analysis –

- What is the main problem that shall be solved with the aid of the organization? (Why is the organization or project needed?)**
 - What are the causes of this problem? Why does it exist?**
 - What effects does the problem have? Why is it important to solve the problem?**
 - Who is affected by the problem and who “owns” the problem?**
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Problem Tree

Effects



Focal Problem



Causes

Problem Tree example

Increased health problems * Increased psycho-social problems *
Decreased quality of life * Decreased energy – including
educational * Emotional pain from exclusion

Child Obesity

Both parent's working * Increased TV consumption * Access to
junk food in school * Reduced recreation activities in schools *
Video games/computer based entertainment * Lack of outside
activities * Neighborhoods more dangerous * processed foods

Step Four: Objective Analysis

- ❑ When stakeholders have identified the problems that the organization can reduce, it is time to develop objectives.
 - ❑ The objective analysis is the positive reverse image of the problem analysis.
 - ❑ During the analysis, we will create three levels of objectives:
 1. Overall Objectives
 2. Project Purpose
 3. Results
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Objective Analysis

Objectives should answer the following questions.

1. What will the projects contribute to achieving in the long run? Why is the organization important? What are the long-term policy objectives to which it will contribute? **(GOAL - Overall Objectives)**
 2. What is the picture of the ideal situation? What is the focus/final result you are trying to achieve? **(Project Purpose)**
 3. Which different sub-goals/outputs are needed in order to achieve the purpose and the overall objectives? **(Results/Outputs)**. States the services beneficiaries will receive from the project.
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Step Five: Plan of Activities

Activities are the means to achieve the objectives and the means to eliminate the causes of the focal problem!

How do we achieve the results/outputs?

Example of Objectives and Activities

- ❑ **Goal – High service level for bus passengers**
 - ❑ **Purpose – Frequency of bus accidents reduced**
 - ❑ **Results/Outputs – Drivers trained, X new buses operational, Maintenance workshop equipped and routines established.**
 - ❑ **Activities – Undertake training program, procure buses, Procure tools and parts, develop routines**
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Step Six: Plan of Resources

Before a project starts, it needs to make a detailed plan of the resources needed to implement the projects.

Resources needed for implementing activities can consist of:

- *Technical expertise**
 - *Equipment**
 - *Premises**
 - *Funds**
 - *Time**
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Step Seven: Indicators

- ❑ **How will you achieve and measure goals?**
- ❑ **To answer this question, organization needs to identify indicators, to measure the progress of the project.**



Indicators:

- *What will the organization achieve in terms of quality? In terms of quantity?**
- *During which period of time?**
- *When will the fulfillment of objectives take place?**
- *Which group is the target group?**
- *Which geographic region or sector is affected?**

Indicators should be objectively verifiable.

Step Eight: Risk Analysis

- Risk Analysis and Risk Management – Identify, analyze, and assess different factors which can affect the possibilities available to achieve outcomes?
 - What conditions is the organization working under?
 - Are there any “killing factors”?
 - How do we avoid potential risks?
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Step Nine: Assumptions

- ❑ Organizations do not exist in a social, economic, and political vacuum.
 - ❑ Its success is dependent on norms, laws, policies, political will, allocation of funds, etc. or the 'Institutional Situation' in a country or environment.
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Assumptions:

It is not always possible to exert influence over the institutional situation, so we outline our assumptions for our projects.

These assumptions should be analyzed through the problem analysis before the project is started.

Workplan and Budget

Time to create your workplan and budget. All of the information from this plan will be compiled into a log frame.
