

# JCIBook.net

## Strategic Planning



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## What is a strategy?

Let's say that a strategy, in a largely accepted way, is a structure of goals, politics, programs, actions, decisions, and resource allocation, that define what the organization is, what it does and how it does it.

STRATEGY	Is a structure of:	That define:
	- goals	- What is the organization?
	- politics	
	- programs	- What is does?
	- actions	
	- decizioni	- How it does it?
	- resourse allocation	

## What is Strategic Planning?

- Strategic Planning is a set of concepts, procedures and instruments that are meant to help leaders, managers and planners to think and act in a strategic way.
- Strategic Planning is also a process that conducts and supports development and change, as a response to organization's needs and aspirations, through elaborating a program of actions that solves and anticipate the problems that may occur.

## Strategic Planning is NOT

- a substitute for strategic thinking and action;
- a substitute for leadership;
- synonym with elaborating operational plans.

## Strategic thinking and action

The main purpose of strategic planning is to generate through the organization a style of prudent strategic thinking, directed to taking further its mission, fulfilling its mandates, and pleasing its main stakeholders. We will consider stakeholders any natural or legal persons, groups, organizations, institutions that share an interest, are influenced/affected or can influence/affect (directly or indirectly) the efficient functioning and the durability of the organization. (We can include here: our own employees or volunteers, the governing board, our collaborator and partners, donors, financing institutions, clients, future members and employees, the networks and forums that our organization is a member in etc.)

## What makes us start a strategic planning process?

- there are so many different demands that it's hard to prioritize;
- we need to clarify what is that we do best, to keep doing it, and to discover what other things can we start;
- we have a big, stressing problem to solve;
- we should rethink the way we attract funds;
- we need to educate, involve and revitalize the board and the employees.



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## Benefits of strategic planning

1. Promoting strategic thinking and acting. This helps in developing a more structured way of obtaining internal and external information, in directing attention towards different stakeholders, in cultivating a more careful system of internal training and evaluation, and in clarifying organizational needs and priorities in action.
2. Improving the decision making process.
  - Strategic planning helps organizations to define, formulate and communicate their intentions and expectations regarding the strategy;
  - Strategic planning is oriented towards the problems of great importance;
  - Strategic planning helps decision makers to decide in the present taking into account the future consequences;
  - Strategic planning helps in developing a coherent and justified base for decision making;
  - Strategic planning helps to coordinate decisions taken at different levels in the structure;
  - Strategic planning can help to create an agreement of discretion regarding some problems of the organization.
3. Enhancing responsibility and improving performance.
4. Better functioning of the whole organization, through:
  - a better understanding of responsibilities, that leads to task fulfillment;
  - clearer internal processes;
  - encouraging team-work.



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## When not to start a strategic planning process

- when there are urgent financial or human resources problems to solve, or when there is an open key management position;
- when the decision makers don't have the capacity, resources or determination to create a good plan.

## The paradox of Strategic Planning:

*Strategic Planning is most needed where it has fewer chances to work !!!*

## What do we need to start a strategic planning process?

- good leaders that are willing to act, and key people that support, approve, and legitimize the effort, all decided to help making the process work;
- to start with a clear understanding and to obtain a consensus among the key involved persons regarding what strategic planning is, what it involves and what it is expected from this process;
- to form a team responsible for strategic planning, and a decision making body or group of advisers that supervise the process;
- to have some outside advisers or experts that can insure an external assistance (for checking, evaluating and "outside of the box thinking");
- to identify critical problems that require immediate attention, in order to avoid the confrontation with big risks of missed opportunities;
- to identify the expected benefits of the process;
- to elaborate acceptable strategies that can be implemented, in accordance with organizational politics.



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## Which are the obstacles of strategic planning?

Obstacle:	How to overcome it:
<b>Time</b> (to many urgent problems)	<ul style="list-style-type: none"> <li>- include planning elements in day to day meetings</li> <li>- form a planning committee</li> <li>- use a facilitator</li> </ul>
<b>Resources</b> (finances, skills)	<ul style="list-style-type: none"> <li>- recrute a person with facilitation skills</li> <li>- watch video materials or read useful info about the subject</li> <li>- attend training programs on planning and facilitation</li> <li>- include planning in operational expences</li> </ul>
<b>Devotion</b>	<ul style="list-style-type: none"> <li>- identify the benefits and anxieties of the people involved, regarding to strategic planning</li> <li>- organize a brainstorming to identify the proper means to overcome problems and obtain benefits</li> <li>- prove the value of strategic planning through video materials, examples form other organizations, or quotting experts</li> </ul>
<b>The planning team</b> (lack of diversity)	<ul style="list-style-type: none"> <li>- organize a brainstorming to determine who should be involved (members of the board, employees, volunteers, ...)</li> </ul>
<b>Change</b> (fear of change)	<ul style="list-style-type: none"> <li>- simplify the process</li> <li>- include as many as possible in the assesmnet process</li> </ul>
<b>Commune vision and values</b> (lack of)	<ul style="list-style-type: none"> <li>- alocate time and effort to explore the personal and organizational values</li> <li>- all members should identify their personal interest in the organization</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>- analize materials</li> <li>- exercise planning</li> <li>- use resouce persons</li> </ul>

## What does it involve?

- effort
- time
- knowledge
- will
- resources
- expertise

## Who should be involved?

The strategic planning team:

- people from inside – from all the levels/structures of the organization
- external experts, collaborators, interested of affected people

## The 10 steps of Strategic Change:

1. Initiate the process and obtain the approval of all interested factors, stakeholders
2. Identify what are the organization's mandates (what is expected from it)
3. Clarify organization's mission and values
4. Asses the internal and external context
5. Identify the strategic problems
6. Elaborate the strategies for fixing those problems
7. Reevaluate and adopt the strategic plan
8. Set an efficient organizational vision of success
9. Develop an efficient implementing plan
10. Monitor and reevaluate the whole process



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**Ioana Nicușan**

Trainer at **Development Training Consulting**



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