



STRATEGIC PLANNING

ORGANISATIONAL DEVELOPMENT
INSTRUMENTS

“A goal without a plan is just a wish” - Antoine de Saint-Exupery

Strategic planning is an organisational activity undertaken to set priorities, focus energy and resources, strengthen processes, ensure that members/ staff/ volunteers and other stakeholders are working toward common goals, establish agreement around intended outcomes/ results, and assess and adjust the organisation’s direction in response to a changing environment.

Steps for a sound strategic planning:

1. Set the basis – define the process, the budget, responsible person(s)

Define the process: What is the simplest and most realistic way in which you can make the strategic planning? What will be the concrete steps? What will be the timeframe and resources proposed?

Define the budget: What is the budget you can allocate to the process? What are the specific budgetary items that could be included? (e.g. fee for external facilitator, costs for staff retreat, etc.)

Define the responsible person(s): Who is going to be in charge of the strategic planning process?

2. Define the context

- a. *PESTEL analysis* - In order to conduct any strategic work, it is necessary to reach a common understanding, or agreement, about what is happening in the environment in which you work. A PESTEL analysis is a tool used to analyse and monitor the macro-environmental (external environment) factors that have an impact on an organisation. Please use the template below and fill it in.

Political Factors - political stability or instability, laws, conservative or progressive developments, easier or harder to work with governments/ public institutions, more or less support for social causes, etc.

Economic Factors - changes in economic structures, changes in income and wealth, changes in labour participation, exchange rates, economic growth or downturn, more or less money available for NGOs projects and programmes, better or less chance with public or other donors, etc.

Social/cultural Factors - population growth, age distribution, health consciousness, career attitudes, increasing or decreasing diversity, immigration or emigration, changes in family structure, changes in lifestyle, changing gender roles, education systems changing, changes in media use, etc.

Technological Factors - internet development, social media importance, spreading of fake news and/ or hate speech, developments in robot technology and artificial intelligence, etc.

Environmental Factors - climate change, changes in water/air /life quality affect different groups differently, food prices change, energy prices change, etc.

Legal Factors - changes in legislation affecting beneficiaries, bureaucracy, laws and policies change, etc.

- a. *SWOT analysis* - The result of the PESTEL analysis can be further used to identify threats and weaknesses in a SWOT analysis. Please use the template below and fill it in.

<p>Strengths</p> <p>(Internal factor / Positive influence) What are we good/ best at? What specific skills do we have? What financial resources do we have? What connections do we have?</p>	<p>Weaknesses</p> <p>(Internal factor / Negative influence) What are we not so good at doing? What do we lack? What is our financial position? What connections should we have, but don't?</p>
<p>Opportunities</p> <p>(External factor / Positive influence) What changes in the external environment can we exploit? What weaknesses in our competitors can we use to our advantage? What new technology might become available to us? What new markets might be opening to us?</p>	<p>Threats</p> <p>(External factors / Negative influence) What might our competitors be able to do to hurt us? What new legislation might damage our interests? What social changes might threaten us? How will the economic cycle affect us?</p>

Adapted from Marketing Theories – Swot Analysis,
<https://www.professionallacademy.com/blogs-and-advice/marketing-theories---swot-analysis>

- a. *Stakeholder review.* In order to have a realistic overview of the development of the organisation it is important to ask the stakeholder opinion. For this there can be carried out interviews, focus groups, sending out questionnaires. Some questions that can be included in these instruments are:

Can you describe your relationship with the organisation, if any?

What do you know about the organisation and its activities?

Can you point some of the organisations achievements?
Does something need to be improved?

Can you identify any threats for the organisation?

What would happen if the organisation would not exist?

Do you have anything else that you would like to add?

1. Review the vision and mission

EXERCISE VISION

Step 1:

Take a few minutes to answer the questions: “What do we dream of becoming if all resources would be available? How do we want the world to be?”

Step 2:

Discuss/ share the answers inside your organisation and take out the key words that are common to more people

Step 3:

Write a statement from the key words

EXERCISE MISSION

Step 1:

Take a few minutes to answer the following questions: “What are we doing (actions)? For whom are we doing the action? Why are we doing the actions?”

Step 2:

Discuss/ share the answers inside your organisation and take out the key words that are common to more people

Step 3:

Write a statement from the key words

Please fill in the following table, based on the previous exercises:

	Current	(possible) New
Vision statement		
Mission statement		

EXERCISE VALUES

1. Ask a list of five to seven core values from each of your members/ staff/ volunteers.
2. Merge the lists by combining values that are listed more than once.
3. Bring the group together to discuss the list of values.
4. Revise and modify until you have generated a final list of value statements.
5. After you have your list of organisational values, put the finishing touches on the statements and communicate it inside and outside the organisation.

What are your organisation values?

To keep in mind:

- Create phrases, not just single words.
- Make the values specific.
- Communicate/ share the values within and outside the organisation.
- Keep the list of values between three and five.

1. Establishing strategic priorities

Based on the general assessment, what are the strategic priorities for the organisation?

2. Write strategic objectives

What are the strategic objectives? Please formulate at least one objective per each priority. The strategic objectives do not need to be SMART!

1. Operationalize

Please fill in the following template for the strategic plan:

	Strategic priorities	Strategic objectives	Activities	Outcomes	Outputs	How do we monitor	Resources	Person in charge/ Team
1								
2								