

## Why Your Organization Needs a Strategic Plan

Strategic planning is a process of taking account of the internal and external factors relevant to an organization to outline organizational goals, objectives, and strategies for a certain period of time in the future (usually 5 to 10 years).

The importance of strategic planning:

- Orients departmental goals with organizational goals
- Clarifies the vision, mission, and values of the organization
- Prepares for internal and environmental changes
- Demonstrates clear communication to all parties (stakeholders, participants, & team members)



## Steps for Strategic Planning

### Step 1: Assess the current situation with a SWOT analysis.

**SWOT** analysis is a framework used to evaluate an organization's competitive position and environmental context. A SWOT analysis assesses internal and external factors, as well as current and future potential.

- It can help you determine the organizational strengths and weaknesses along with the external opportunities and threats.

**Internal Factors:** Resources and experience readily available within the organization

- **Strengths:** components of the NGO which gives it advantages over other organizations

➔ **EXAMPLES:** experienced staff, local knowledge, organizational partnerships

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⚙️ **Weakness:** components of the NGO which are disadvantageous relative to other organizations

➔ **EXAMPLES:** high cost of materials, inconsistent funding

**External Factors:** environmental factors relevant to the organization's success that are outside the organization's control

🌱 **Opportunities:** aspects in a NGO's external environment that allows it to create and implement strategies to increase participant reach or impact

➔ **EXAMPLES:** good public transportation, local schools, community centers with rentable space

🚫 **Threats:** aspects in a NGO's external environment that hinders participant reach and impact

➔ **EXAMPLES:** threatening government, unsafe roads, gender discrimination that limits girls and women from participation

**Try it yourself! Here's a SWOT Analysis Diagram**


<b>Internal Factors</b>	<b>Strengths</b>	<b>Weaknesses</b>
<b>External Factors</b>	<b>Opportunities</b>	<b>Threats</b>

## Step 2: Clarify the organization's mission, values, and vision.

- 🌐 **Mission:** an explanation of the purpose of the organization, reasoning for its creation, and its intentions.
  - 🌐 **Vision:** the future aspirations of the organization for the community in which they work.
  - 🌐 **Values:** the core principles that the organization follows to achieve their goals.
- ➔ Clarifying these three components will allow the organization to do some introspection to see if they are on track with their aspirations.
  - ➔ The clarified mission, vision, and values should be clear to staff, participants, and board members.

## Step 3: Identify strategic issues and questions.

- 🌐 **Strategic Issue:** a fundamental challenge that impacts several components of an organization (stakeholders, management, resources, structure, or organizational mission)

 **EXAMPLES** of strategic issues an organization could face:

- ➔ What do we (the organization) have to do to construct the brand and reputation of our organization?
- ➔ What is our organization going to do to mitigate the threats (negative external factors) that could affect the organization in the next 5 years?



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→ How can we improve the quality of our board of directors to be able to guide us through the next 5 years?

⚽ A SWOT analysis, community listening sessions, and focus groups with staff and/or participants are examples of how an organization would identify their own strategic issues.



## Step 4: Develop goals, objectives, and strategies to address the issues and challenges your organization is facing.

⚽ It is easier to address problems with the organization now that the challenges have been identified and named.

⚽ Set S.M.A.R.T. (specific, measurable, attainable, relevant, time-bound) goals.

→ These goals are more tangible and therefore more manageable to complete.

→ Setting these goals gives the organization motivation to complete them and insures that the organization's vision is being worked towards.



**EXAMPLE** challenge and SMART goal response:

→ **Strategic Challenge:** Funding has become inconsistent. Grant cycles are coming to a close; the Government is cracking down on foreign involvement; and many individual donors have shifted their focus from sport to technology.

→ **SMART Goal:** The organization will recruit 20 new individual donors totaling \$25,000 and secure 1 new grant totaling at least \$150,000 by January 2021 through increased efforts in fundraising in U.S. academic and sport foundations as measured quarterly with fundraising campaign checklists, grant applications submitted, and donation tracking.

## Step 5: Write and communicate the plan with relevant stakeholders.

- ⚙️ Have one formal copy of the strategic plan written to share with your board and keep on file.
- ⚙️ Keep in mind literacy levels and organizational understanding. The methods you use to communicate the strategic plan with your staff is different than the methods you will use for your board or for your participants.



## Step 6: Execute the plan.

- ⚙️ Create an action plan to help keep you on track to execute the strategic plan. This helps create a realistic timeline, identify a responsible team, and set benchmarks during which you can look at progress or re-evaluate.



## Step 7: Monitor and evaluate the results to keep the organization and leadership accountable.

- ⚙️ Make a MEL plan for the organization to stay on track with their strategic SMART goals.
- ⚙️ Continually monitor and evaluate the organization to help resolve issues before they turn into larger problems.
- ⚙️ Examine the organization regularly for areas of concerns to improve impact and allow the organization to adjust when needed.