Strategic Planning Seminar

Partner Training Series

The Myths

Strategic planning is very complex, and the plan must be lengthy and very detailed.

Strategic planning requires a particular expertise not commonly found in most organizations.

Strategic planning is very time consuming

The onus of creating a strategic plan is on the executive director.

Donors want to see a strategic plan, but it is not a useful document for the organization itself.

The Benefits

Fosters collaboration between all stakeholders and builds teamwork within the organization.

Strengthens an organization's ability to identify challenges and create solutions to address those challenges.

Creates a pathway for transformative change by clearly articulating why the organization exists and how to best serve an organization's beneficiaries.

Brings clarity and purpose by collectively deciding organizational priorities and strategies.

Builds Commitment, Community & Compassion for an Organization's Mission & Vision

Key Elements

Executive Summary

Mission, Vision, Values

Theory of Change

Program Goals and Tasks

Strategies

Performance Indicators
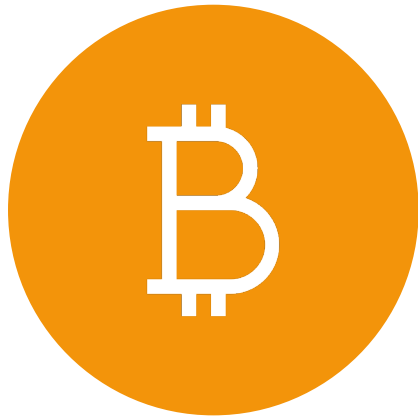

Goals and Objectives

Situational Analysis

Drivers

New Organization or 1st Time Plan

Crisis – Internal or External

Program or Issue Driven

Organizational Growth

Getting Started

PARTICIPATION

TYPE OF STRATEGIC PLAN

PROCESS

Planning the Process

Potential Contributors	Collecting Information	Developing the Content	Components
Staff Funders Board Members Program Recipients	• Interviews • Workshops • Secondary research • Government Policies & Programs	o Situational Analysis o Mission, Vision, Values Exercises o Organizational History Review o Theory of Change Creation o Summary of Programs and Operations o Current Strategy Review o SWOT Analysis o Evaluation of Current Programs o Program Measurement Strategies o Budget Analysis	1. Mission Statement 2. Vision Statement 3. Values 4. Theory of Change 5. Key Strategy Summaries 6. List of short-term program and management priorities. 7. Financial Plan

Mission, Vision, Values

Mission
- Communicates what you do and why you do it. Who, What, Why.

Vision
- A vision statement communicates what success will look like if the organization achieves its purpose (mission).

Values
- What behaviors should people commit to support the values, beliefs and principles?

AMPLIFY GIRLS
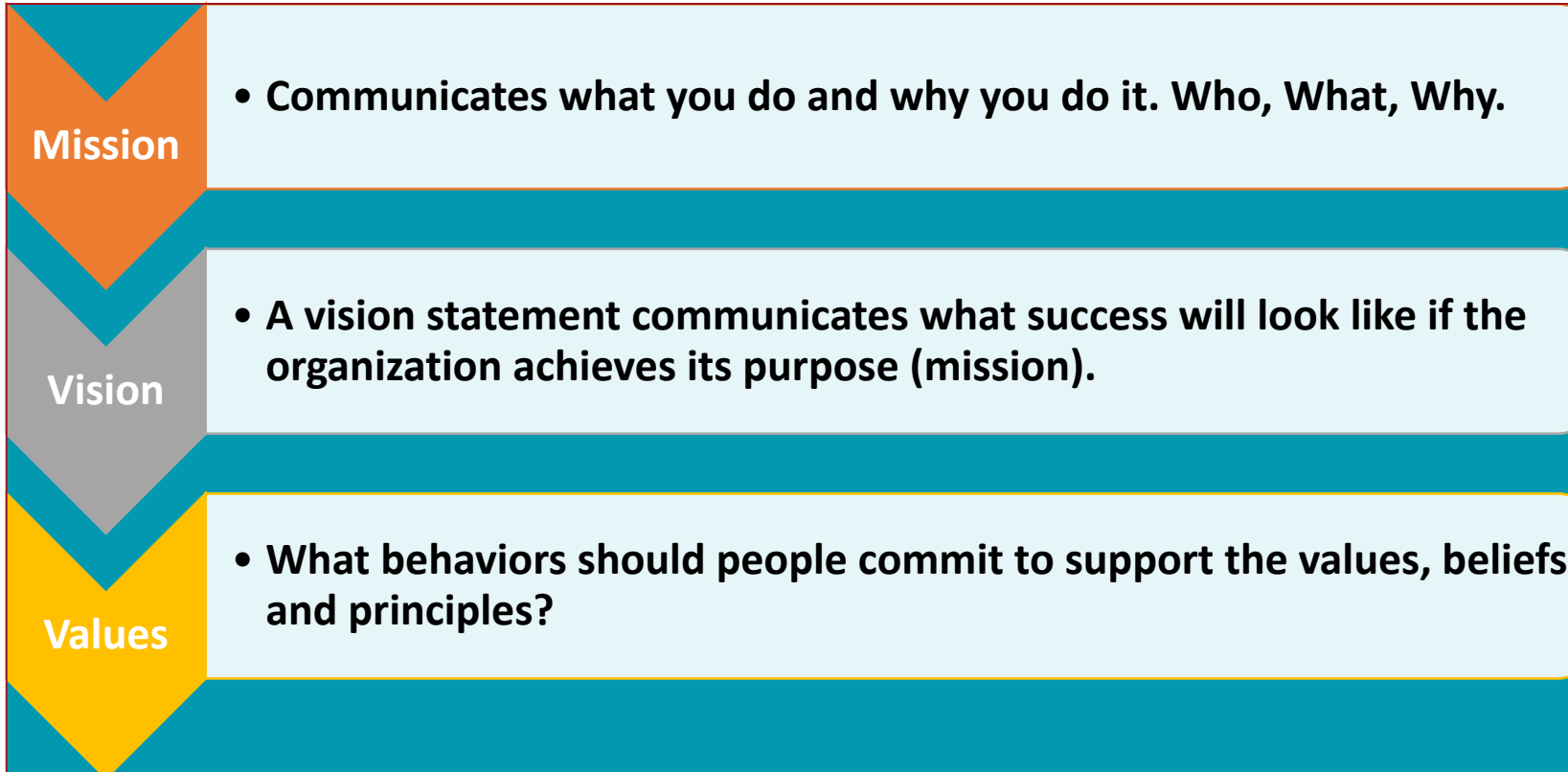
A Theory of Change is an important strategic component of a non-profit organization.

It articulates how and why change will occur and highlights what outcomes are expected.

A theory of change explains what an organization hopes to accomplish and the benefits of those accomplishments to the targeted recipients.

A **Theory of Change** provides a pathway or road-map for an organization.

Creating a Theory of Change

Articulate a problem statement – what problem is the organization addressing?

Identify the long-term goals of the organizations.

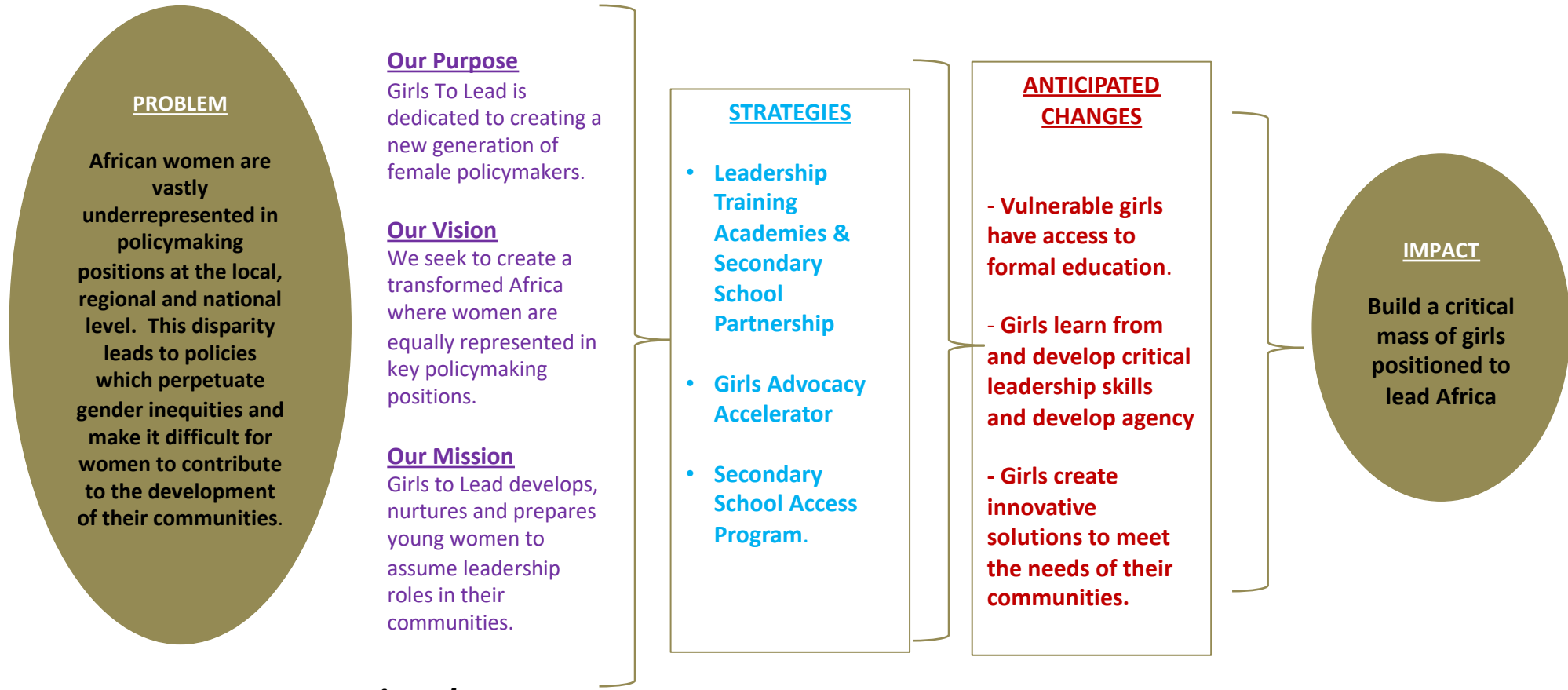Express the values of the organization

Establish the guiding principles of the organization.

Identify the interventions that will address the problem the organization is trying to solve.

Develop a narrative that explains the logic of the organization.

THEORY OF CHANGE – Example

PROBLEM

African women are vastly underrepresented in policymaking positions at the local, regional and national level. This disparity leads to policies which perpetuate gender inequities and make it difficult for women to contribute to the development of their communities.

Our Purpose
Girls To Lead is dedicated to creating a new generation of female policymakers.

Our Vision
We seek to create a transformed Africa where women are equally represented in key policymaking positions.

Our Mission
Girls to Lead develops, nurtures and prepares young women to assume leadership roles in their communities.

STRATEGIES

- **Leadership Training Academies & Secondary School Partnership**

- **Girls Advocacy Accelerator**

- **Secondary School Access Program.**

ANTICIPATED CHANGES

- **Vulnerable girls have access to formal education.**

- **Girls learn from and develop critical leadership skills and develop agency**

- **Girls create innovative solutions to meet the needs of their communities.**

IMPACT

Build a critical mass of girls positioned to lead Africa

We Recognize That

Women are vastly under-represented in policymaking positions at the local, regional and national level
Girls lack the opportunity to develop leadership skills
Girls more often lack access to formal education than boys
Gender equity in policymaking roles would contribute to more prosperous communities

Mission

- What is the primary problem your organization is seeking to address?
- Why was your organization formed?
- What need or opportunity does your organization exist to resolve?
- If the organization is successful, what impact would it have on the problem?
- What assumptions exist upon which the organization does its work?
- What is the purpose of your organization?
- What are the methods that the organization will use to accomplish its purpose?
- Describe the "business" of your organization

Vision

Guidance

Work in teams or individually to do answer either one or two of the questions listed. Once completed read aloud to the group and build consensus around similar themes and ideas.

o Describe how the world would be improved, changed or different if your organization was successful in achieving its mission?

o Imagine an article is being written about your organization in 10 years, what would you want the headline to say?

o What would the lead paragraph say?

Turning Values into Principles

AMPLIFY GIRLS

Guidance

Develop a list of values which you want represented in your organization. Use the list to create statements that capture the expectations you have for all stakeholders – including beneficiaries and donors.

- Trust
- Teamwork
- Passion
- Commitment
- Communication – Effective/Productive
- Following policies
- Respecting group decision
- Respecting everyone's opinion.
- RESPECT
  - Everyone needs to respect – not dependent on education or language capabilities
- Privacy
- Openness among team
- Honesty
- Social Emotional Learning
- Psychological Support
- Quality
- Excellence
- Motivation/Entrepreneurship
- Active Participation
- Giving Back
- Faith
- Self-Reliance

Value Statements

- We believe in self-reliance and know all people can be independent if given the right tools and support.

- We value leadership and believe all children can be leaders and be productive members of society if they are given love, support, education and mentorship.

- We value community and believe local people are the best to identify problems and create solutions. We support and value this philosophy.

- We believe success can only be achieved if there is trust, honesty and productive communication.

SWOT Analysis

Guidance

- Work to identify program and administrative strengths and weaknesses and the internal forces working for and against the organization's ability to achieve its mission.

- List the key opportunities and threats – political, economic, social, technological that impact your organization's ability to achieve its mission.

- Correlate (optional) opportunities & strengths, threats & weaknesses. Are there opportunities that can be seized because of strengths or conversely are there, threats that are worse because of weaknesses?

Strengths	Weaknesses
Opportunities	**Threats**

Program Planning

- Name of Program:
- Description of program:
- # of people served:

  - What is the need in the community that this program addresses?
  - Who is the target audience of the program?
  - What impact does this program currently have on the need identified above? What is the outcomes) of the program?
  - Measures of success: How is success for this program defined? What evidence is there that this program is having the impact it was designed to have? What do program recipients value? How do we measure success?
  - What are the greatest strengths of this program?
  - What are the greatest weaknesses of this program?

Program Strategy

- Why are the programs your organizations operates, or funds, needed? What do you think the current and future needs are for such programs?

- Is your organization using the most effective way to meet the needs of your target audience? Could your organization meet those needs in a different, more impactful way?

- Is your organization best suited to provide these programs? Why? What makes your organization different? Do you have the right organizational capacity to be highly competitive?

- Are there effective collaborations your organization can form to better achieve it's mission and provide more efficient/effective delivery of services?

- Are there other organizations in your community that do almost the same thing? How can you differentiate your organization? Or how can you complement another organization's work?

Program Strategy

Strategy	Assumptions, facts, and values supporting strategy	Obstacles & Potential Challenges	Organizational Response

Strategic Priorities

Organization Function	Strategic Priority	Goals	Action Items
Fundraising			
Programmatic			
Communications & Advocacy			
Administrative			

Measuring Success

Measure	Target	Description
Program X		
Program Y		
Budget		
Human Resources		
Financial Resources		

Budget Item	Annual Cost
Feeding Program	$19,897
Afterschool Tutoring & Sports Program	$6,119
Early Childhood Education	$6,617
Secondary School Scholarships	$9,147
Administration (Bonus, Transport Allowance, Volunteer support, Contingency)	$24,787
Salaries (Education Coordinator, ECD, teachers, HIV/AIDS officer, Driver, Guards)	$18,431
Operational Expenses (Electricity, Water, Vehicle service, Fuel, Transport cost for Educational Coordinator)	$7,000
TOTAL BUDGET	$109,5000