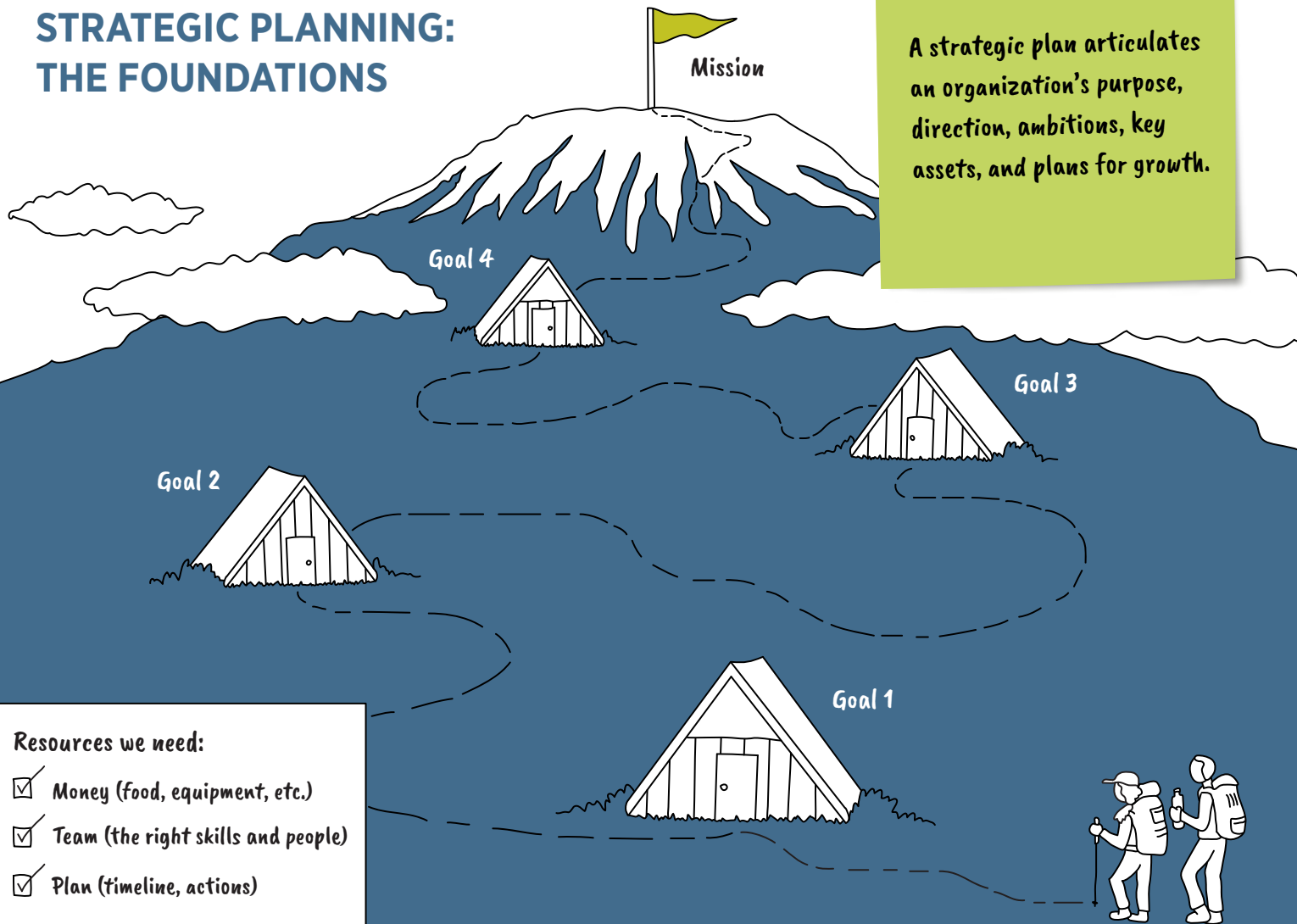


STRATEGIC PLANNING: THE FOUNDATIONS

A strategic plan articulates an organization's purpose, direction, ambitions, key assets, and plans for growth.



What makes a good strategic plan?

Inclusive and owned: The strategic planning process should consider a range of stakeholder interests, and decisions must be owned by the entire organization, including staff, board and leadership.

Informed: Making informed decisions requires having a solid understanding of the context in which an organization works as well as about the organization itself.

Realistic and ambitious: Strategic plans should strike a balance between an organization's past track record and its future plans. An organization that never changes what it does or tries to change too much too quickly risks affecting its performance.

Clear and concise: Strategic plans are guiding tools, which means they need to be accessible and clear, and used to make practical decisions on a regular basis.

Focused: Great organizations are able to maintain focus on the most important things. A good strategy forces an organization to make tough decisions and be clear about what they want and need to achieve and specifically how they will do that.

Flexible and 'living': Organizations must be ready to adapt and to revise their strategies as needed in order to always be as effective and efficient as possible.

Developing a great Strategic Plan

A strategic plan is an overarching description of how your organization will deliver on its core purpose and goal(s).

1. Design the Process



Strategic plans set the direction for an organization, thus investing time and resources into the process is critical. At the outset you need to design what the process should look like, which includes identifying who should be involved and consulted, what information you need to collect, what questions you must answer, and your timeline.

Identify key stakeholders: you'll want input from key partners, constituents, board, and team members - identify the different stakeholders that matter to your organization.

Reflect and plan: Set aside adequate time to work through an effective and consultative team process of reflection and analysis that will guide the choices you make about your process.

2. Analyze your Context

To make hard choices and decisions an organization must understand the broader context in which it works.

What are you great at doing and what opportunities can you leverage for greater impact? On the other hand, where do you struggle and what potential risks stand in your way?

"You can't read the label when you're in the jar."



Reflect on your past work:
What did you achieve, and where did you fall short?

Reflect on your organization:
What are you great at doing, where do you struggle?

Look at the context:
What social, political, and environmental factors are changing where you operate? These changes may create new opportunities or new threats that you need to consider when planning the way forward.

Situational Analysis - SWOT

A SWOT analysis is a useful framework to help an organization gather information that will help it make informed decisions during a strategic planning process.

Strengths
What is your organization good at?

Weaknesses
Where does your organization have challenges?

Opportunities
What external factors offer opportunities for your organization?

Threats
What are potential threats that could put your work at risk?

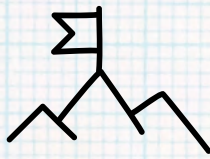
3. Articulate the problem you need to solve

You can't bring about lasting change unless you know what problem you are trying to solve. A key element of strategic planning is identifying the problem your organization is working to solve.

Ask yourself: To be successful, what problem must we overcome? Once you've identified that, you can then figure out what's needed to solve the problem (hint: that's what your strategy is all about).



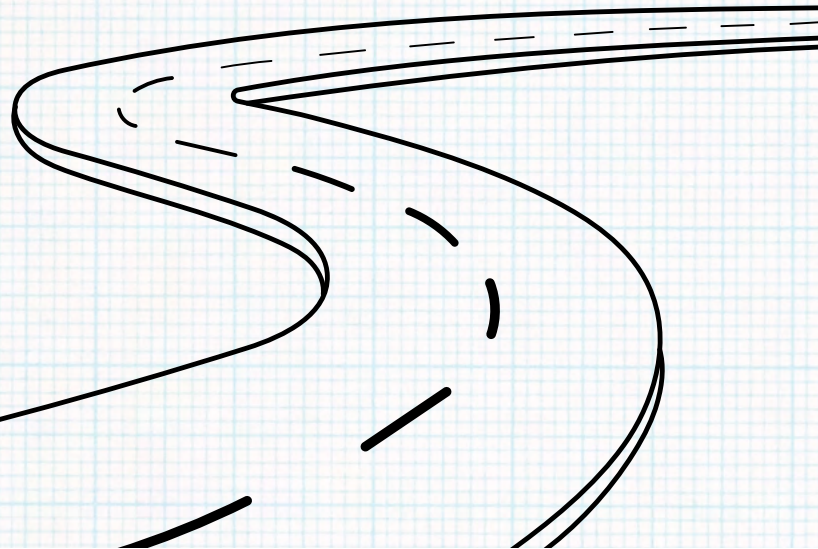
Problem Statement:
a simple description of the problem an organization is working to solve.



4. Clarify your purpose

The core foundations of an organization are its vision for the future, its mission in bringing about positive change, and the unique capabilities it lends to its work and the wider field.

All of this is basically about an organization's core purpose and reason for existing, which should guide everything else that you do.



Vision: The ideal future state your organization wishes to see take shape – it's your ultimate 'dream' of the future. A vision is achieved by many working together and will not result solely from the work of your organization alone.

Mission: What an organization is trying to accomplish in order to bring about its vision of the future.

Value proposition: The assets, capabilities, and approach that makes your organization unique. It describes how and why you are able to create impact differently from other organizations.

5. Explain your logic and thinking

How will your organization bring about the key changes needed to achieve your mission? What do you believe you must do to deliver results and bring about change? An organizational 'theory of change' is the articulation of this logic and of your beliefs.

It captures and articulates your organization's formula for impact and provides guidance for all programs and projects.

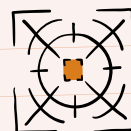
Theory of Change

Describes how an organization believes it will achieve its mission. In its simplest form, theory of change is an explanation of how the work of an organization brings about the future they want to create.

6. Identify your goals and priorities

Your mission and theory of change are put into practice by developing a key set of organizational goals and objectives. Goals and objectives outline the most important work that an organization needs to achieve in order to deliver on its mission. What are the major achievements you need to work towards, often over multiple years, to be successful? These are your goals.

Objectives are shorter-term, more specific components of a goal. Developing your goals and objectives is all about prioritizing time and resources so you focus on the most critical areas, opportunities, and interventions. Focused, concrete, and important goals will drive an organization towards success, and guide all your plans.



Goal:

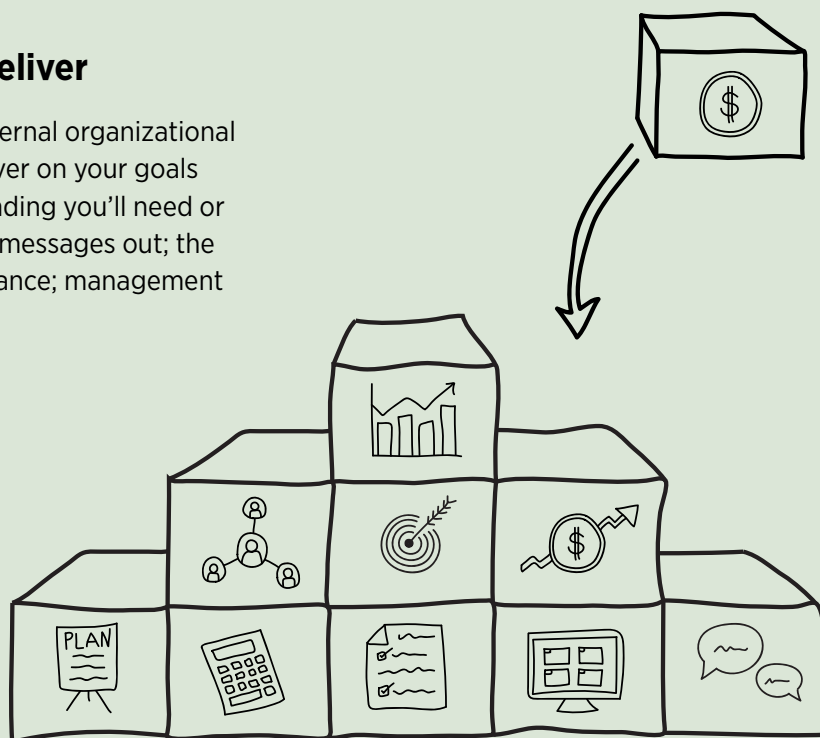
A significant and often complex envisioned end-state that may take multiple years to achieve. An organisation usually has multiple goals that contribute towards their mission.

Objectives: Components of a goal, simpler in scope and shorter in time to achieve than a goal; each goal may have several component objectives. This is how the organisation will achieve its mission.

7. Build an organization that can deliver

A good strategy needs to clearly set out the internal organizational capabilities and resources you will need to deliver on your goals and mission. This can include things like the funding you'll need or the communications support that will get your messages out; the team composition and structure; board governance; management systems; technology; and infrastructure.

If you have a clear picture of what you want to achieve, what success looks like, and what resources you need to be successful, then you'll be on your way to achieving great things.




8. Make it beautiful

A strategic plan should guide everyone's work in an organization, thus it needs to be accessible, clear, and useful. Basically, it's a document you want people to want to pick up and read. It is also an important tool to share with donors, partners, and your constituents to ensure they understand your work and purpose and can get behind it. Take the time and resources needed to craft a well-written and beautifully designed strategic plan.

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