

Implementation Tips for USAID Partners

Sharing Resources and Knowledge Among the Global CSO Community

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Definitions

Action plan—A series of specific steps describing what needs to be done, how, when and by whom to accomplish one or more objectives. Written action plans can be used at the organizational, project or activity level.

Horizon—The amount of time an organization will look into the future when preparing a strategic plan. This time frame typically ranges from two to five years, but the appropriate horizon depends on the sector.

Vision—An inspiring statement of what an organization is striving to achieve. CSOs often focus on the problem they hope to solve by painting a picture of an image they have for the future after the problem has been solved or the situation measurably improved.

Mission—Takes the vision a step further by summarizing the actions the organization is going to take to make its vision a reality. It is a statement that clarifies the purpose of the organization and its daily business.

Stakeholders—Individuals or organizations that can influence or be affected by your program.

SWOT analysis—A process of considering the Strengths and Weaknesses within your organization, plus factors outside your organization that offer Opportunities or pose Threats.

References

[Civic Strategic Planning Toolkit](#)

[Problem Solving: SWOTS & Strategic Plans](#)

An Overview of Strategic Planning

Q. How do we get started planning for the future?

A. Strategic planning is a participatory and structured process to help you determine your organization's future direction. It is a management tool that will help your organization identify its current capacities, its needs and its goals. There are various methods for conducting strategic planning, but at its simplest it is a process of collectively answering four basic questions:

- Where are we now?
- Where are we going?
- How will we get there?
- How will we know if we have arrived or not?

A strategic planning process and its results are only as good as they are honest and useful—honest means looking at internal and external factors objectively, and useful means putting into words the specific goals and action steps to help guide the organization forward.

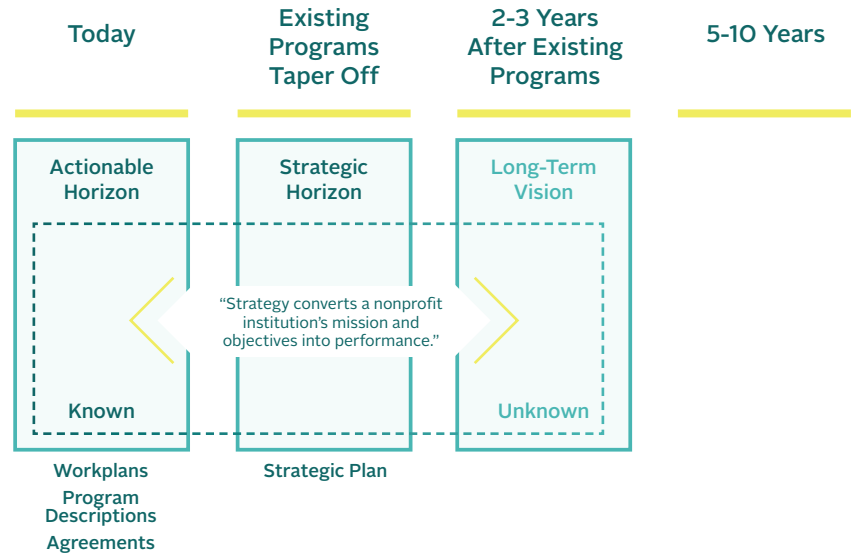
The Planning Timeframe

Think of the future of your organization as divided into three phases:

1. The **actionable or short-term horizon** is defined by what you know—the program descriptions, agreements, staffing arrangements and workplans currently in place. Your actionable horizon may be a year or it may extend through the end of your USAID award or other funding.
2. Your **strategic or medium-term horizon** is typically a two- to five-year period, which begins when your actionable horizon starts to taper off. Variables such as funding, staffing and workplans tend to be increasingly uncertain as funding for specific programs ends.
3. Beyond your strategic horizon lies your **long-term vision**. This is where variables become unpredictable, but your organization's long-term vision is the driving force for charting your course. However, some variables may not be completely open-ended. For example, you may not be able to identify future funding sources precisely, but you likely have some good ideas and leads. This is the phase during which your strategic plan is especially relevant.

“Strategic planning is a process by which we can envision the future and develop the necessary procedures and operations to influence and achieve that future.”

- Clark Crouch



Ten Steps in Strategic Planning

- 1. Agree on a strategic planning process.** To get buy-in and improve the chances that the plan will not sit on a shelf, involve the people who will be responsible for implementing the plan. At a meeting with the key staff, Board members and even some external stakeholders, clarify the mandate and scope of work and discuss the value of strategic planning and its costs in terms of time and resources. Develop a workplan and timetable and assign specific tasks to individuals.
- 2. Define or review the organization's vision and mission.** Be sure there is a consensus on why the organization exists, what it seeks to achieve and whom it serves. This forms the basis for writing or reviewing your vision statement. Then, write or review your mission statement.
 - *Sample vision statement:* "XYZ CSO envisions our community free of hunger, where every person has secure access to sufficient and safe food to sustain a healthy and productive life."
 - *Sample mission statement:* "Our mission is to fight poverty and hunger in our community by building agricultural, educational, and economic development programs that meet the needs of the community."
- 3. Conduct an environmental scan or SWOT analysis.** Look at the Strengths and Weaknesses within your organization, plus factors outside your organization that offer Opportunities or pose Threats. Rather than try to solve all your problems at once, choose a priority, such as staffing, and consider it from these four points of view. After the analysis, decide what you want to change or what needs to be changed.

For More Information

For this or other issues of *Implementation Tips*, please visit www.NGOConnect.net. The Web site is a dynamic and interactive portal dedicated to connecting and strengthening CSOs, networks and CSO support organizations worldwide.

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- 4. Identify key issues and choices.** Discuss and specify the organization's priorities in terms of time and importance.
- 5. Develop strategic goals.** Link your strategic goals to your vision. This is essentially a picture of what the organization will be like if it successfully implements the strategic plan. For example: "Increase the income of female-headed households in X province through better animal husbandry and marketing."
- 6. Develop strategic objectives that describe how you intend to accomplish your goals.** For example: "By [year], we will support [N number of] initiatives aimed at increasing the income of [Y number of] female-headed households in X province through improved livestock breeding and raising practices and better marketing."
- 7. Create an action plan.** Describe the specific steps—what needs to be done, how, when and by whom—to accomplish each strategic objective.
- 8. Identify the resources needed to carry out your action plan.** Answer basic questions including: What funding sources do we have? Where else might we find funding? What human resources do we need? Who among our staff has the necessary knowledge, skills and experience? Add the answers to your action plan.
- 9. Create a budget and implementation plan.** Once you have developed the action plan and identified the necessary resources, estimate how much it will cost to carry it out over the next three years.
- 10. Monitor and evaluate progress; adjust the plan as required.** The strategic planning committee should continue to meet regularly to look at internal progress and external realities and then modify the plan as necessary to reflect new circumstances.

